1991 NOVA SCOTIA TOURISM STATISTICAL REVIEW

Research Section

Nova Scotia Department of
Tourism and Culture

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FORWARD

The ***1991 Nova Scotia Tourism Statistical Review*** contains the main industry statistics generated annually by the Nova Scotia Department of Tourism and Culture. The primary purpose of The Review is to present the major indicators of tourism industry performance for 1991, using 1990 as a basis for comparison. Where appropriate information is available, general trend information has also been included.

The Review is comprised of four main parts. First, the ***Tourism Economic Impact Report*** presents estimates of the value of the tourism industry to Nova Scotia.

The second component of the review, the ***Visitor Volume Report***, documents the number of visitors entering Nova Scotia by road and air between mid - May and the end of October.

The ***Fixed-Roof Accommodation Report*** combines an inventory of rooms and properties with room sales data and occupancy rates. Both supply and demand-side data are broken out by geographical area.

The ***Campground Report*** includes an inventory of municipal and private campgrounds in Nova Scotia, as well as sales data and occupancy rates.

For further information about any of the statistics contained in this review, please contact the Research Section at (902) 424-4225.

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1991 NOVA SCOTIA TOURISM ECONOMIC IMPACT REPORT

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FORWARD

Tourism, a major force in both the national and provincial economies, generates hundreds of millions of dollars in sales for Nova Scotia businesses, and tens of thousands of jobs for Nova Scotia workers. In addition, both the provincial government and municipal governments receive tens of millions of dollars in tax revenues from tourism-related expenditures and business every year. These benefits are realized in virtually every area of the province and span a range of industries almost as broad as the economy itself.

This document quantifies these benefits by presenting estimates of the economic impact of the tourism industry in Nova Scotia. Included are estimates of total tourism receipts segmented by type, expenditure, and region. Also presented are estimates of municipal and provincial taxes generated, the number of jobs created, and the payroll paid by the tourism industry.

This *Tourism Economic Impact Report* is one of four reports which collectively form the *1991 Tourism Statistical Review*. Other sections of the review which are also available under separate cover include the *Visitor Volume Report*, the *Fixed-Roof Accommodation Report*, and the *Campground Report*.

Note: The method used for allocating total provincial receipts and other impacts across the various tourism regions of Nova Scotia was revised in 1991. The estimates contained in this section reflect this new allocation basis. Estimates for 1990 have also been revised and are re-stated in the appropriate tables.

A description of the tourism regions referred to in this report appears on page 8.

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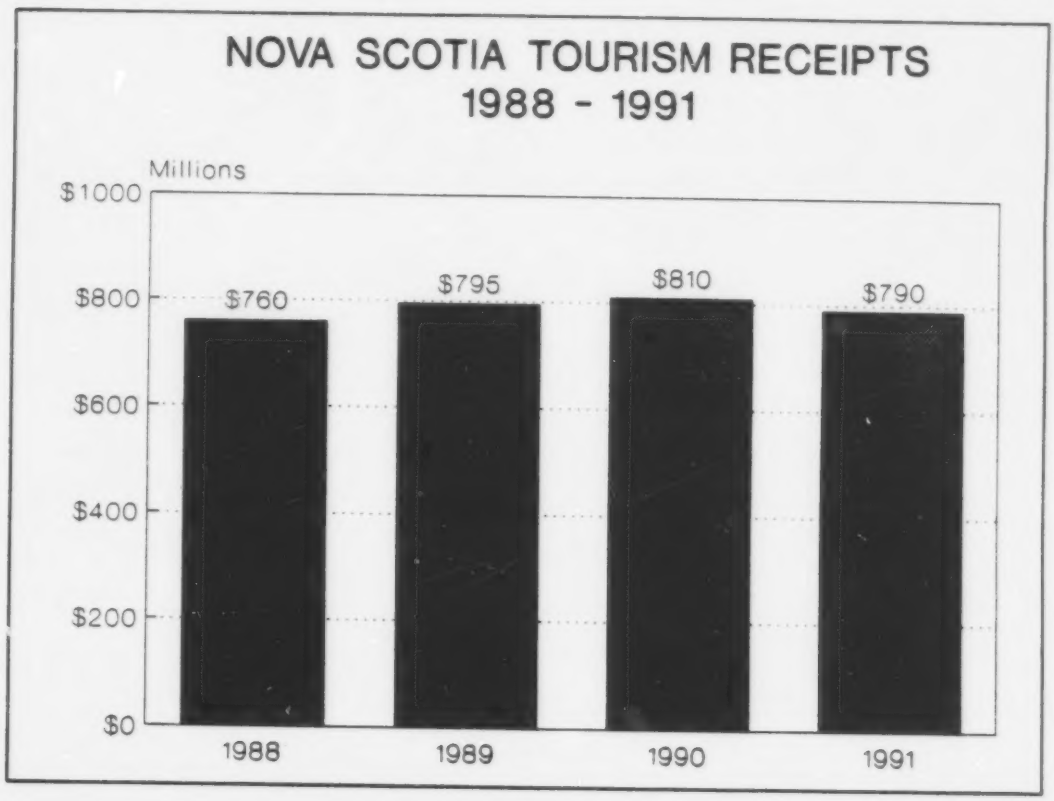
TOTAL TOURISM RECEIPTS

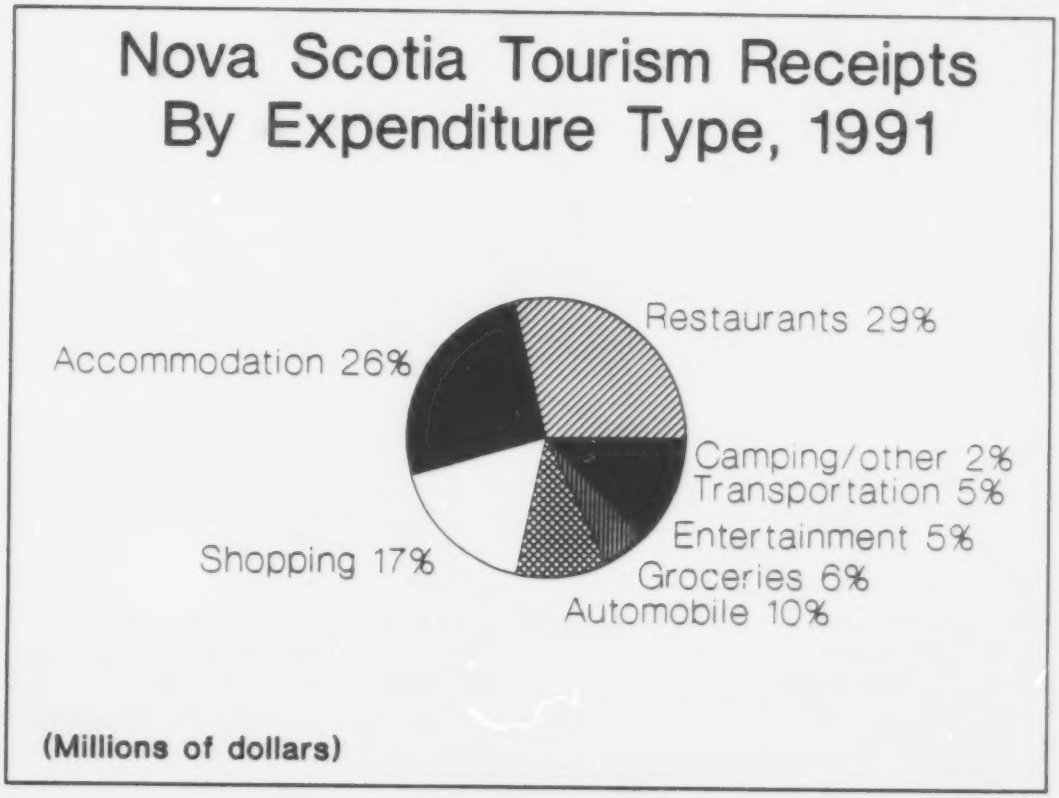
During 1991 the tourism industry generated an estimated $790 million in receipts in Nova Scotia. This represents a decrease of 2.5% from 1990, when an estimated $810 million in revenues were taken in. In fact, 1991 Tourism receipts fell slightly below the level achieved in 1989. Despite the lower levels of travel activity accompanying the current recession, tourism continues to be a vital component of Nova Scotia's economy, in terms of both revenue and employment generation.



The tourism industry benefited a broad spectrum of businesses in Nova Scotia. The largest single beneficiary was the food and beverage sector which accounts for more than a quarter of all the province's tourism receipts at an estimated $227 million. The accommodations sector is next at $203 million, accounting for a quarter of all travel dollars spent in Nova Scotia. The industry also generated $137 million in visitor spending in the retail sector. Automobile-related expenditures accounted for $82 million. Visitors spent $45 million on groceries, $40 million on entertainment and $38 million on local transportation. Campground fees accounted for 1% of total receipts at $8 million, while miscellaneous "other" expenses amounted to an additional $10 million.

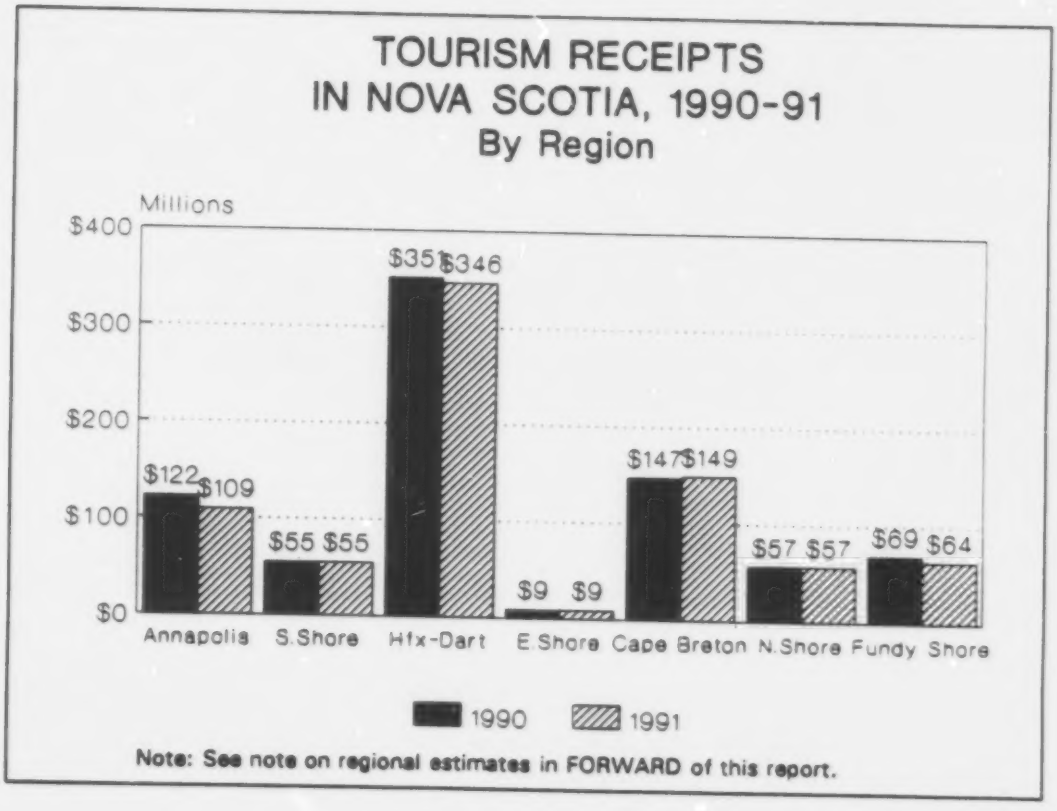
Table E-1
Tourism Receipts in Nova Scotia
by Expenditure Category, 1991

Type of Expenditure	Amount (Millions)	% of Total
Restaurants	$ 227	29%
Accommodation	203	26%
Shopping	137	17%
Automobile	82	10%
Groceries	45	6%
Entertainment	40	5%
Transportation	38	5%
Campgrounds	8	1%
Other	10	1%
Total	$ 790	100%



TOURISM RECEIPTS BY REGION

Tourism has a major impact throughout all regions of Nova Scotia. The Halifax-Dartmouth region was the largest in 1991, having generated some $346 million in receipts, or about 44% of the provincial total. Cape Breton accounted for the second largest proportion of the province's tourism receipts, having generated an estimated $149 million or about 19% of the provincial total in 1991. The next largest share of provincial tourism receipts was claimed by the Annapolis Valley, with $109, or 14% of the total. The industry generated an estimated $64 million, or about 14% of the total, in the Fundy Shore region. The Northumberland Shore and the South Shore generated receipts of $57 million and $55 million, respectively. These two regions each accounted for approximately 7% of total provincial tourism receipts. At $9 million in estimated receipts, the Eastern Shore region accounted for about 1% of total provincial tourism receipts.



Note: See note on regional estimates in FORWARD of this report.

Two tourism regions posted increases in receipts in 1991 - Cape Breton, which saw a 1.6% increase and the South Shore, where receipts grew by 1.1%. All other regions experienced lower receipts in 1991 than in 1990. In the Eastern Shore, receipts declined by 0.3%, while in Halifax-Dartmouth, receipts fell by 1.4%.

Table E-2
Tourism Receipts in Nova Scotia
by Region, 1990-91

	1990		1991		
Tourism Region	Amount (Millions)	% of Total	Amount (Millions)	% of Total	1990/1991 Change
Halifax-Dartmouth	$ 351	43.4%	$ 346	43.9%	-1.4%
Cape Breton	147	18.1%	149	18.9%	1.6%
Annapolis Valley	122	15.0%	109	13.8%	-10.1%
Fundy Shore	69	8.6%	64	8.2%	-7.1%
South Shore	55	6.8%	55	7.0%	1.1%
Northumberland Shore	57	7.1%	57	7.2%	-1.6%
Eastern Shore	9	1.1%	9	1.1%	-0.3%
Total	$ 810	100.0%	$ 790	100.0%	-2.5%

Notes: 1. Columns may not exactly equal totals due to rounding.
2. See note on regional estimates in FORWARD of this report.

The Northumberland Shore experienced a decrease of 1.6% in tourism receipts. The Fundy Shore and the Annapolis regions incurred decreases of 7.1% and 10.1%, respectively.

TAX REVENUES

In 1991, the tourism industry generated an estimated $59 million in provincial tax revenues for the Province of Nova Scotia - $2 million less than in 1990. In addition, total municipal taxes were estimated to be $27 million, for a total of $86 million in tax receipts. Compared to 1990, this represents an overall decrease of 2.5% in tax receipts accruing from tourism.

Table E-3
Estimated Tourism Industry Taxation
by Region, 1990-91

	1990	1991			
Tourism Region	Total (Millions)	Provincial (Millions)	Municipal (Millions)	Total (Millions)	% Change
Hfx-Dart	$ 38	$ 26	$ 12	$ 38	-1.4%
C. Breton	16	11	5	16	1.6%
Annapolis	13	8	4	12	-10.1%
Fundy Shore	8	5	2	7	-7.1%
S. Shore	6	4	2	6	1.1%
N.Shore	6	4	2	6	-1.6%
E. Shore	1	1	0	1	-0.3%
Total	$ 88	$ 59	$ 27	$ 86	-2.5%

Note: 1. No separation of municipal and provincial tax receipts is available for the Eastern Shore region.
2. Columns may not exactly equal totals due to rounding.
3. See note on regional estimates in FORWARD of this report.

The Halifax-Dartmouth region accounted for the greatest amount in combined municipal and provincial taxes at about $38 million, while Cape Breton accounted for an estimated $16 million. The tourism industry in the Annapolis Valley region generated an estimated $12 million in municipal and provincial taxes in 1991. Tax receipts were similar in the Fundy Shore ($7 million), Northumberland Shore ($6 million) and South Shore ($6 million) regions. The Eastern Shore generated roughly $1 million in combined provincial and municipal taxes, during 1991.

EMPLOYMENT

Tourism remained an important employer in the Nova Scotia economy, although the estimated number of jobs declined 8.1% from 1990 levels. The industry provided approximately 31,000 full-time and part-time jobs, including seasonal and indirect employment, during 1991.

Tourism-related employment is distributed widely across the province. In terms of numbers of part-time or full-time employment, the Halifax-Dartmouth and Cape Breton regions were the largest, accounting for an estimated 13,600 and 5,900 jobs respectively. In the Annapolis Valley region some 4,300 jobs depended either directly or indirectly on tourism, while in the Fundy Shore region, tourism generated an estiated 2,400 jobs. Tourism-related employment levels were similar in the Northumberland and South Shore regions at 2,200 jobs each. Approximately 400 jobs were located in the Eastern Shore region.

Relative to last year, all regions of the province experienced a decline in the number of tourism-related jobs in 1991. The Annapolis Valley and Fundy Shore regions incurred the largest declines, estimated at 15.3% and 12.5% respectively. Tourism-related employment in the Northumberland Shore region declined by 7.3% from 1990 levels, while in Halifax-Dartmouth, the estimated number of tourism-related jobs decreased by 7.1%. Estimated employment levels also fell in the Eastern Shore region, by 6.1%. On a proportional basis, the decline in tourism-related employment was lower in the South Shore (a decrease of 4.7%) and in Cape Breton (down by 4.2%).

Table E-4
Estimated Tourism Industry Jobs
by Region, 1990-91

	1990	1991			
Tourism Region	Total	Direct	Spinoff	Total	% Change
Hfx-Dart	14,600	8,900	4,700	13,600	-7.1%
C. Breton	6,100	3,800	2,100	5,900	-4.2%
Annapolis	5,100	2,800	1,500	4,300	-15.3%
Fundy Shore	2,900	1,500	900	2,400	-12.5%
S. Shore	2,300	1,400	800	2,200	-4.7%
N.Shore	2,400	1,400	800	2,200	-7.3%
E. Shore	400	200	200	400	-6.1%
Total	33,700	19,900	11,100	31,000	-8.1%

Note: See note on regional estimates in FORWARD of this report.
Columns may not exactly equal totals due to rounding.

PAYROLL

In 1991 the estimated total payroll for tourism generated employment in Nova Scotia fell by 2.5%. During 1991, the total payroll for jobs related either directly or indirectly to tourism was approximately $677 million, compared to $694 million in 1990.

Halifax-Dartmouth and Cape Breton accounted for the largest payrolls of $297 million and $128 million, respectively. The Annapolis Valley region ranked third in terms of payroll at $94 million, while the Fundy Shore ranked fourth at $55 million. The Northumberland Shore ($48 million) and the South Shore ($47 million) were next in terms of payroll, while the Eastern Shore region had an estimated tourism-related payroll of $8 million in 1991.

Compared to 1990, most tourism regions in Nova Scotia experienced decreases in tourism-related payrolls in 1991, however, Cape Breton and the South Shore posted increases of 1.6% and 1.1%, respectively. The estimated payroll in the Eastern Shore Region declined by 0.3%. In the Northumberland Shore region the tourism-related payroll fell by 1.6% from 1990 levels, while Halifax-Dartmouth experienced a 1.4% drop. The Fundy Shore and Annapolis Valley experienced decreases of 7.1% and 10.1% respectively.

Table E-5
Estimated Tourism Industry Payroll, 1990-91
by Tourism Region

	1990	1991			
Tourism Region	Total (Millions)	Direct (Millions)	Spinoff (Millions)	Total (Millions)	% Change
Hfx-Dart	$301	$181	$116	$297	-1.4%
C. Breton	126	78	50	128	1.6%
Annapolis	104	57	37	94	-10.1%
Fundy Shore	59	34	22	55	-7.1%
S. Shore	47	29	19	47	1.1%
N.Shore	49	29	19	48	-1.6%
E. Shore	8	5	3	8	-0.3%
Total	$694	$433	$279	$677	-2.5%

Column sums and row percentages may not exactly match due to rounding.

Note: See note on regional estimates in FORWARD of this report.
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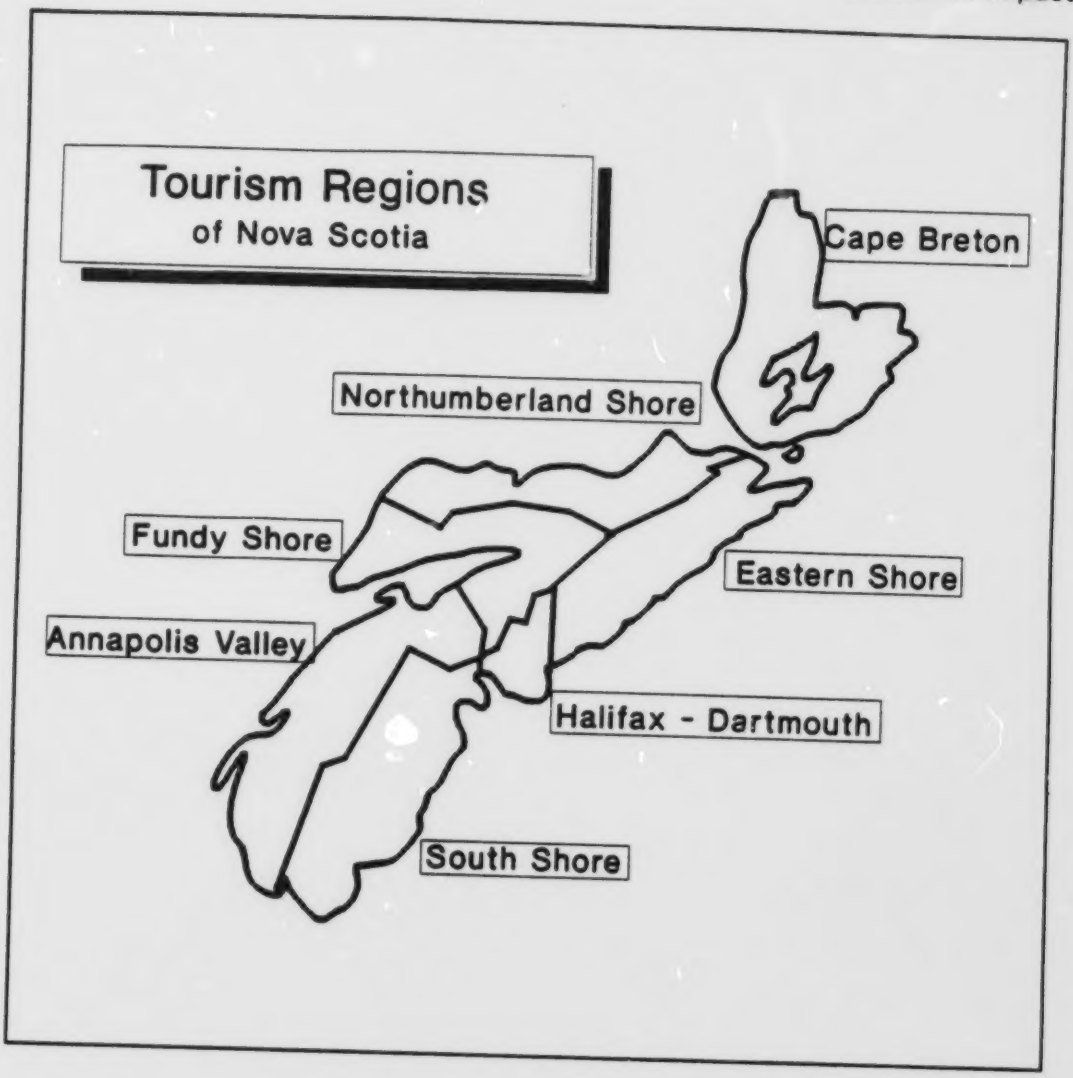
APPENDIX:

TOURISM REGIONS OF NOVA SCOTIA


Tourism Regions
of Nova Scotia
Cape Breton
Northumberland Shore
Fundy Shore
Eastern Shore
Annapolis Valley
Halifax - Dartmouth
South Shore

Description of Tourism Regions of Nova Scotia

Annapolis Valley	Includes portion of Yarmouth County north of line between Yarmouth Ferry Terminal and junction of Yarmouth, Digby, Shelburne and Queens County lines; all of Annapolis and Kings Counties, and portion of Hants County roughly west of the Avon River.
South Shore	Includes portion of Yarmouth County southeast of line between Yarmouth ferry terminal and junction of Yarmouth, Shelburne, Digby and Queens County lines; all of Queens and Lunenburg Counties; and portion of Halifax County roughly described as area west of Pockwock Lake, south of Route 103 and west of route 306.
Halifax-Dartmouth	Includes Cities of Halifax and Dartmouth and (roughly) those areas contained by routes 253, 306, and 349 in the south: area bounded by Route 103 in the west, the Hants County and Colchester County lines in the north and the line between the mouth of Cole Harbour and Gays River in the east.
Eastern Shore	Includes portion of Halifax County east of line between mouth of Cole Harbour running northeast to Gays River, and all of Guysborough County.
Cape Breton	Includes all of Cape Breton Island.
Northumberland Shore	Includes portion of Cumberland and Colchester Counties north of the Trans Canada Highway to Wentworth, then area north of line between Wentworth and Mount Thom, all of Pictou and Antigonish Counties.
Fundy Shore	Includes portion of Cumberland and Colchester Counties south of Trans Canada Highway to Wentworth, remainder of Colchester County southwest of line between Wentworth and Mount Thom and portion of Hants County east of the Avon River.

1991 NOVA SCOTIA

VISITOR VOLUME REPORT

Research Section

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FORWARD

The Nova Scotia Department of Tourism and Culture has monitored visitor volume for several decades. The statistics contained in the *Visitor Volume Report*, when used in conjunction with other indicators, serve as valuable tools in evaluating the overall performance of the tourism industry in Nova Scotia.

This report is comprised of two main components. The first component presents the results of the 1991 motor vehicle count and includes travel to Nova Scotia by automobile, motorcoach and recreational vehicle. All measurements are for the period May 15 - October 31. The data are generated primarily from physical counts taken at the entry points to the province during the survey period. The vehicle counts are tabulated by license plate to facilitate region of origin information.

The second part of the report concerns air travel. The Department's Research Section estimates air visitation based on surveys conducted annually at the Halifax International Airport. As with the motor vehicle counts, all measurements are for the period of May 15 - October 31.

The *Visitor Volume Report* is one of four documents which collectively form the *Tourism Statistical Review*. Other documents which comprise the *Tourism Statistical Review* and which are also available under separate cover include the *Economic Impact Report*, the *Accommodation Report*, and the *Campground Report*.

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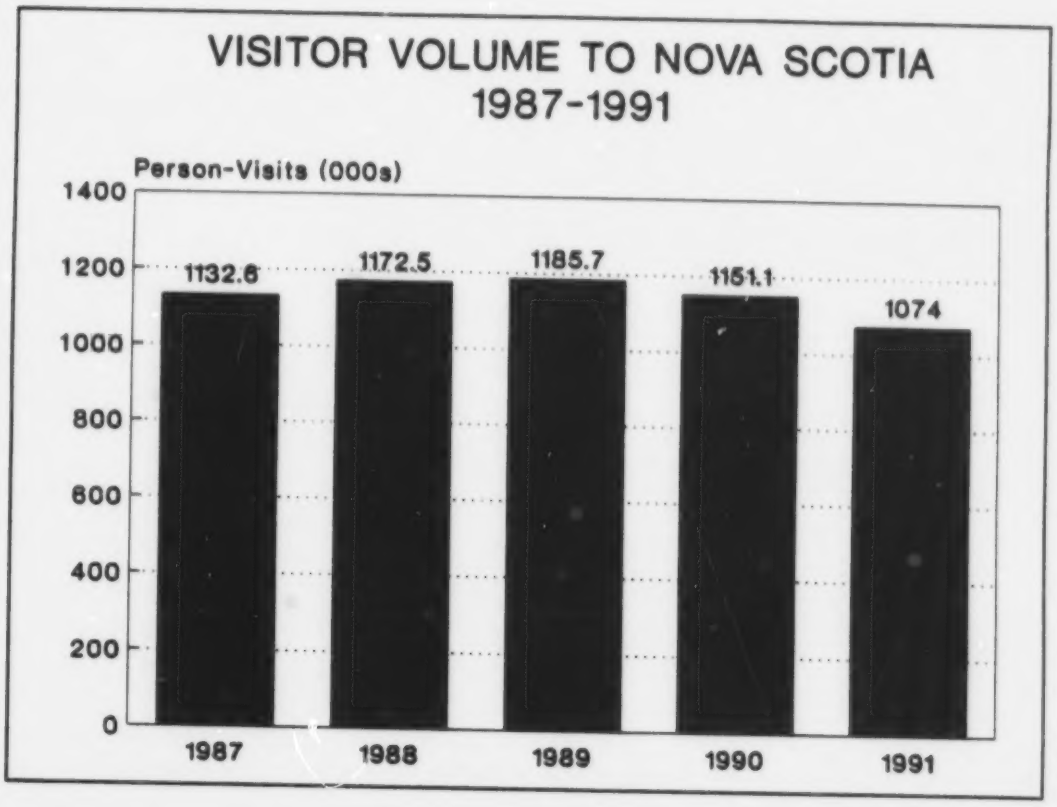
VISITOR VOLUME OVERVIEW

Between May 15 and October 31, 1991, 1,074,000 overnight person-visits were made to Nova Scotia. This represents a 6.7% decline from the 1990 volume of 1,151,100.



Visitor Origin

In 1991, four of every ten visitors to Nova Scotia were from Atlantic Canada. Ontario accounted for 22% of the visitors to Nova Scotia, while one of every 20 visitors originated from Quebec.

Two of every ten visitors to Nova Scotia originated in the United States. The New England and Mid-Atlantic States were the primary source of visitors to Nova Scotia, with three quarters of American travellers to Nova Scotia coming from one of these states. About 40% of the American visitors to Nova Scotia came from the New England states alone.

In 1991, one percent of visitors to Nova Scotia were from overseas countries.

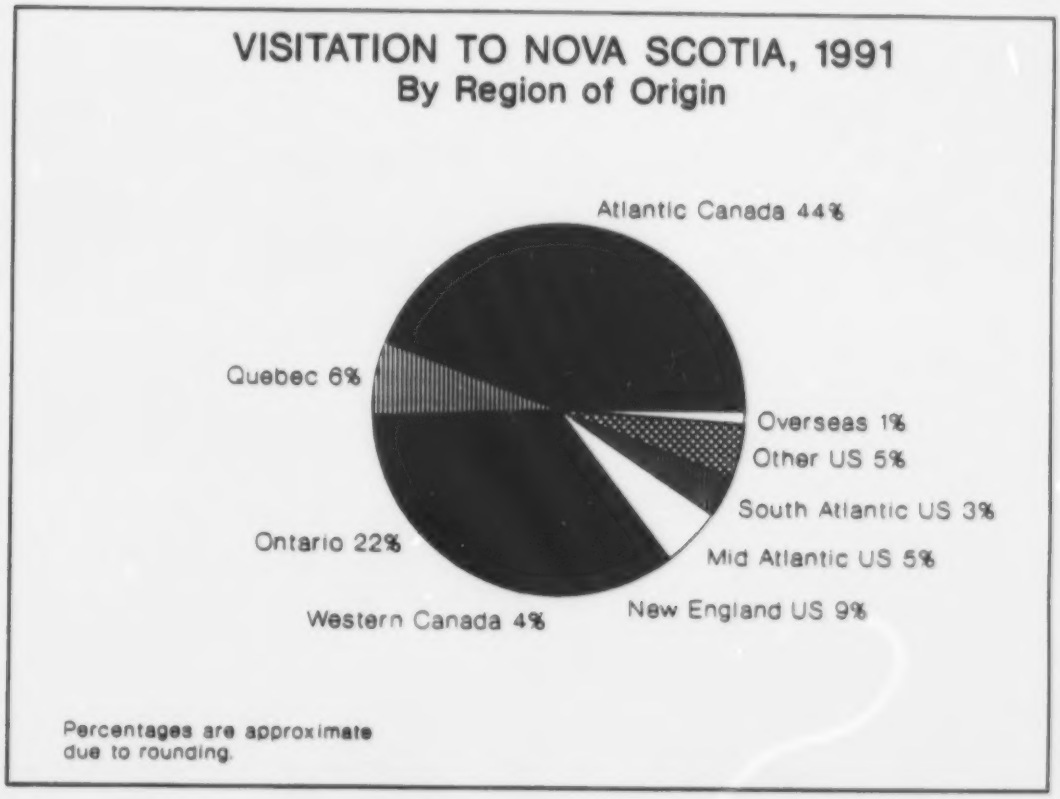


Table V-1
Visitation to Nova Scotia
by Region of Origin, 1990-91

Region of Origin	1990		1991	
Atlantic Canada	489,412	42.5%	477,451	44.5%
Quebec	61,317	5.3%	58,837	5.5%
Ontario	256,733	22.3%	234,733	21.9%
Western Canada	57,625	5.0%	44,959	4.2%
Total Canada	865,087	75.2%	815,980	76.0%
New England	105,622	9.2%	99,067	9.2%
Mid Atlantic	63,632	5.5%	58,479	5.4%
East North Central	22,176	1.9%	22,522	2.1%
West North Central	6,733	0.6%	6,481	0.6%
South Atlantic	41,694	3.6%	37,139	3.5%
East South Central	4,522	0.4%	4,411	0.4%
West South Central	5,676	0.5%	5,442	0.5%
Mountain	4,365	0.4%	4,022	0.4%
Pacific	11,781	1.0%	9,207	0.9%
Total United States	266,202	23.1%	246,770	23.0%
United Kingdom	9,890	0.9%	3,476	0.3%
Europe	5,375	0.5%	4,424	0.4%
Other Overseas	3,010	0.3%	3,318	0.3%
Total Offshore	18,275	1.6%	11,218	1.0%
Total	1,151,100	99.9%	1,073,968	100.0%

* Due to rounding, numbers may not always add to total.

Mode of Travel

The automobile remained the primary means of travel for visitors coming to Nova Scotia, with three quarters of all visitors using this mode.

The second most popular mode of travel was by air, which was used by 14.7% of all travellers visiting Nova Scotia. Air travel experienced a significant drop in 1991, falling 26.5% from 1990 levels. This was a result of a decrease in overall passenger volume passing through the Halifax International Airport combined with a decrease in the proportion of air travellers which were stopping in Nova Scotia overnight (as opposed to those simply passing through). The effect of this shift on the industry was partly off-set by an increase in the average length of stay for air visitors. Prior to 1991, this mode had been exhibiting stronger growth than other means of travel.

The number of recreational vehicles entering Nova Scotia continued to decline in 1991, dropping 9.4% from the previous year. Recreational vehicles now bring about 6.7% of Nova Scotia's non-resident visitors into the province during the May 15 - October 31 period.

Visitor arrivals by motorcoach also continued to fall in 1991,although at a slower rate than in past years. In 1991 some 44,200 visitors entered the province on motorcoach tours, down 1.3% from the previous year.

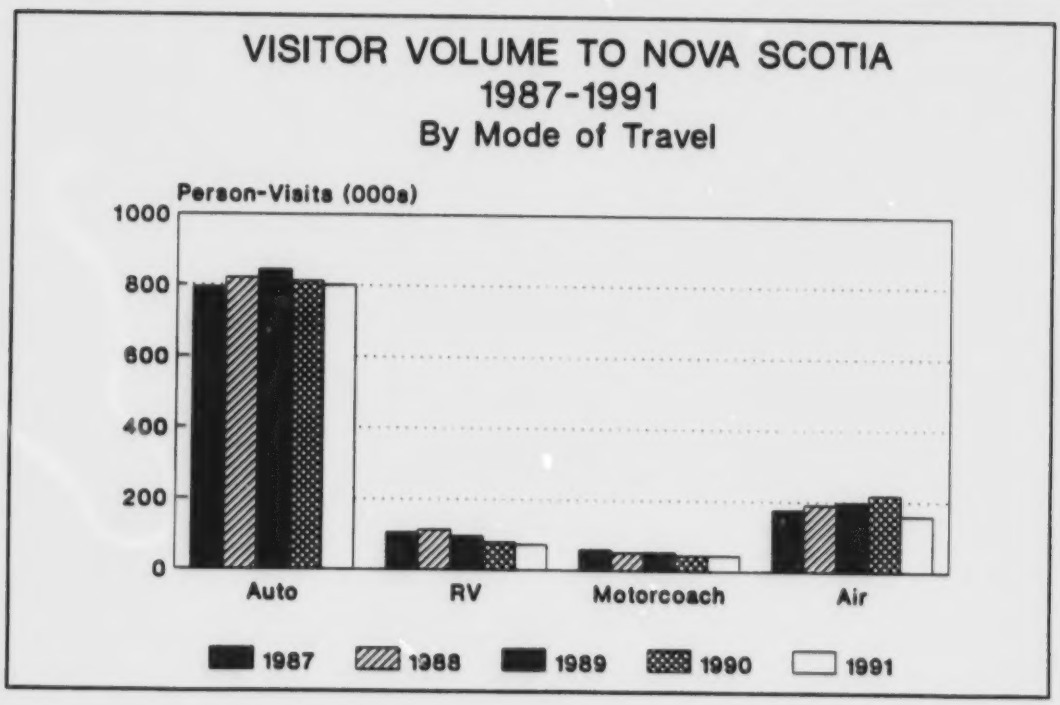


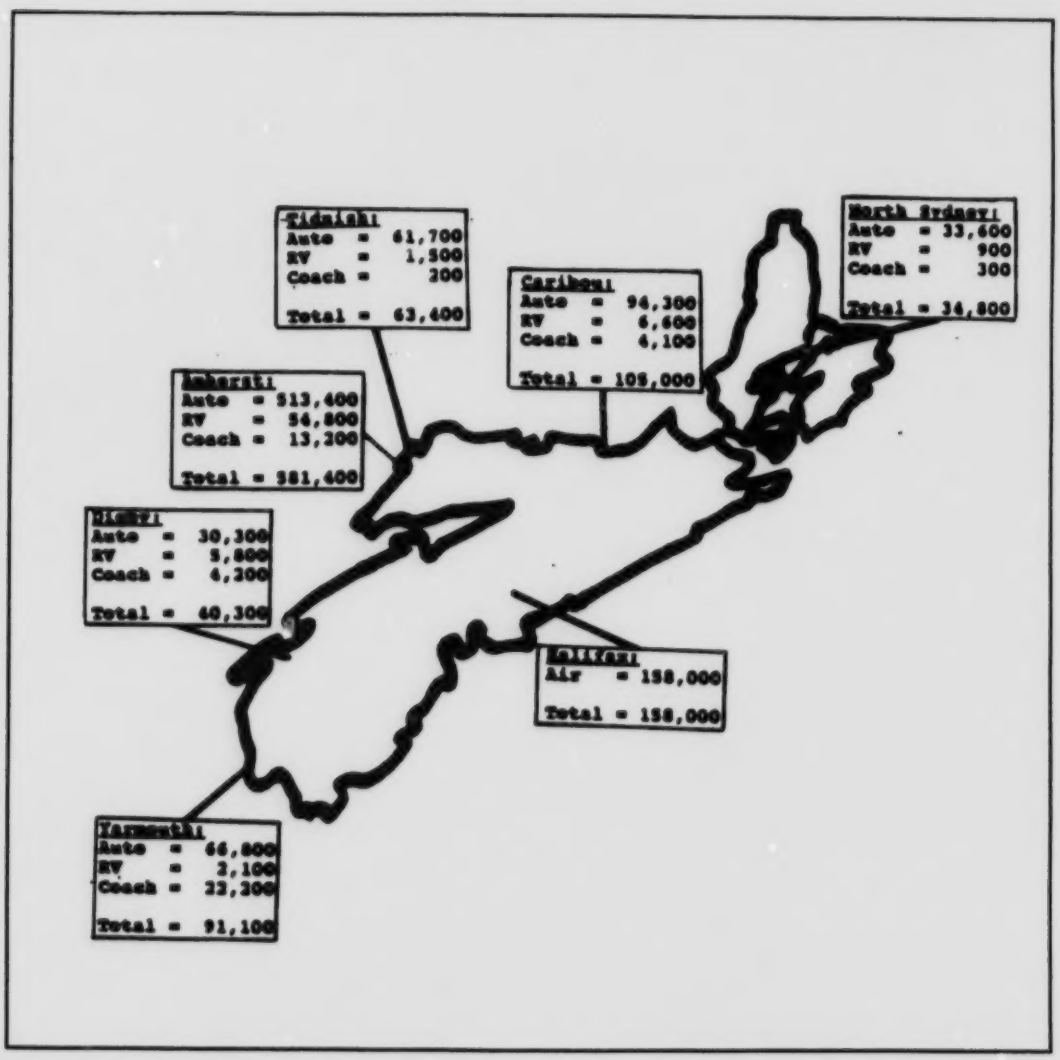
Table V-2
Visitor Volume to Nova Scotia
by Mode of Travel, 1986-1991

	1987	1988	1989	1990	1991	1990-91 Change
Auto	794,000	820,400	842,700	812,200	800,100	-1.5%
RV	104,600	112,100	94,700	79,100	71,700	-9.4%
Mtrcoach.	59,000	50,000	52,300	44,800	44,200	-1.3%
Total Road	957,600	982,500	989,700	936,100	916,000	-2.1%
Air	175,000	190,000	196,000	215,000	158,000	-26.5%
Total	1,132,600	1,172,500	1,185,700	1,151,100	1,074,000	-6.7%

Point of Entry

The map below shows the volume of travellers to Nova Scotia by point of entry to Nova Scotia.

More than half of all non-resident visitors to Nova Scotia entered through Amherst in 1991. Another 15% of travellers entered the province at Halifax International Airport. Caribou was the point of entry for 10% of Nova Scotia's visitors, while 8% entered at Yarmouth and 6% entered at Tidnish. Digby accounted for 4% and North Sydney accounted for 3% of arriving non-resident visitors.



ROAD VISITOR VOLUME

Overview of Road Visitation

Road travel, including visits by automobile, recreational vehicle, or motorcoach, accounted for 85% of visitor volume to Nova Scotia between May 15 and October 31, 1991. Approximately 916,000 non-resident visitors entered Nova Scotia by one of these three modes of road travel. This represents a 2.1% decline in volume compared to 1990. This decline is due to a 1.5% decrease in automobile visitor volume, a 1.3% decrease in motorcoach visitor volume and a 9.4% decline in recreational vehicle visitor volume during 1991.

About half of those visiting Nova Scotia during the 1991 season arrived in either July or August. Another three in ten travellers came during the fall shoulder season of September/October.

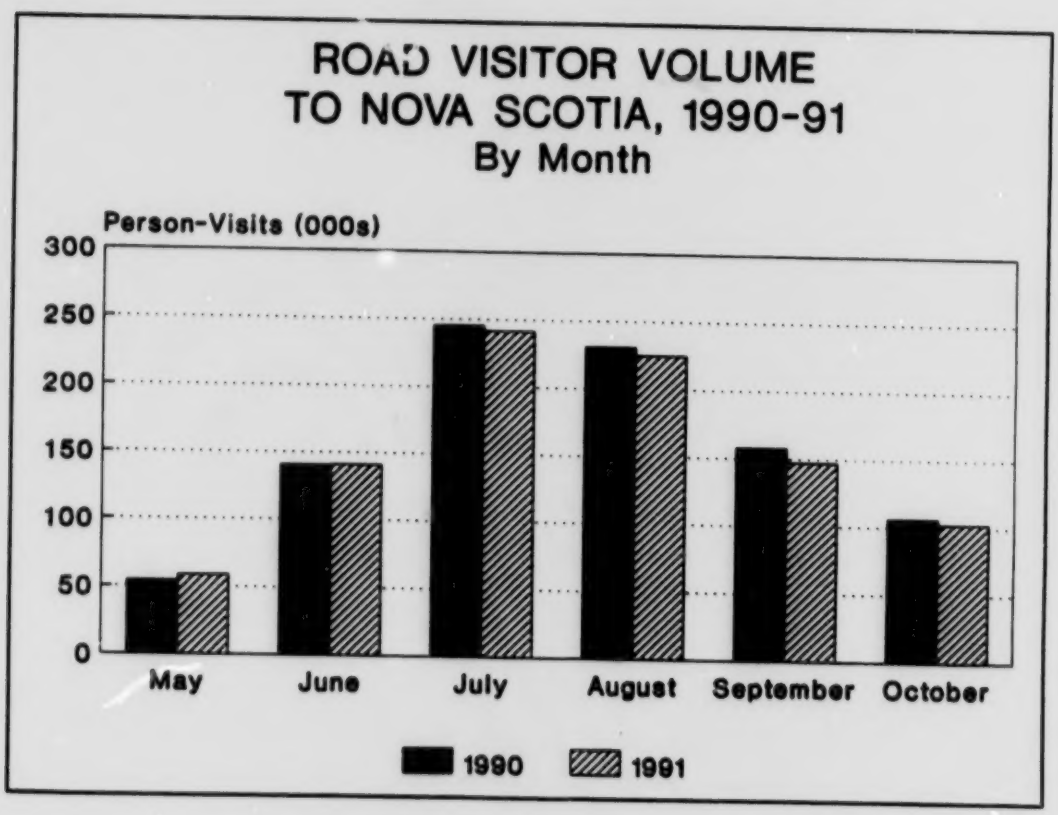


Table V-3
Road Visitor Volume to Nova Scotia
by Month, 1987-1991

	1987	1988	1989	1990	1991
May	53,000	55,600	56,700	54,300	58,500
June	136,600	139,800	140,700	140,500	141,000
July	262,100	273,800	266,200	245,500	241,600
August	240,700	241,000	237,300	231,200	225,000
Sept	158,000	166,000	158,000	158,200	147,400
Oct	107,100	106,300	130,800	106,400	102,500
Total	957,500	982,500	989,700	936,100	916,000

Half of the visitors entering Nova Scotia by road came from the other Atlantic Provinces, two in ten were from Ontario, and one in 20 from Quebec. One quarter of all road visitors originated in the United States, primarily from the New England and Mid-Atlantic states.

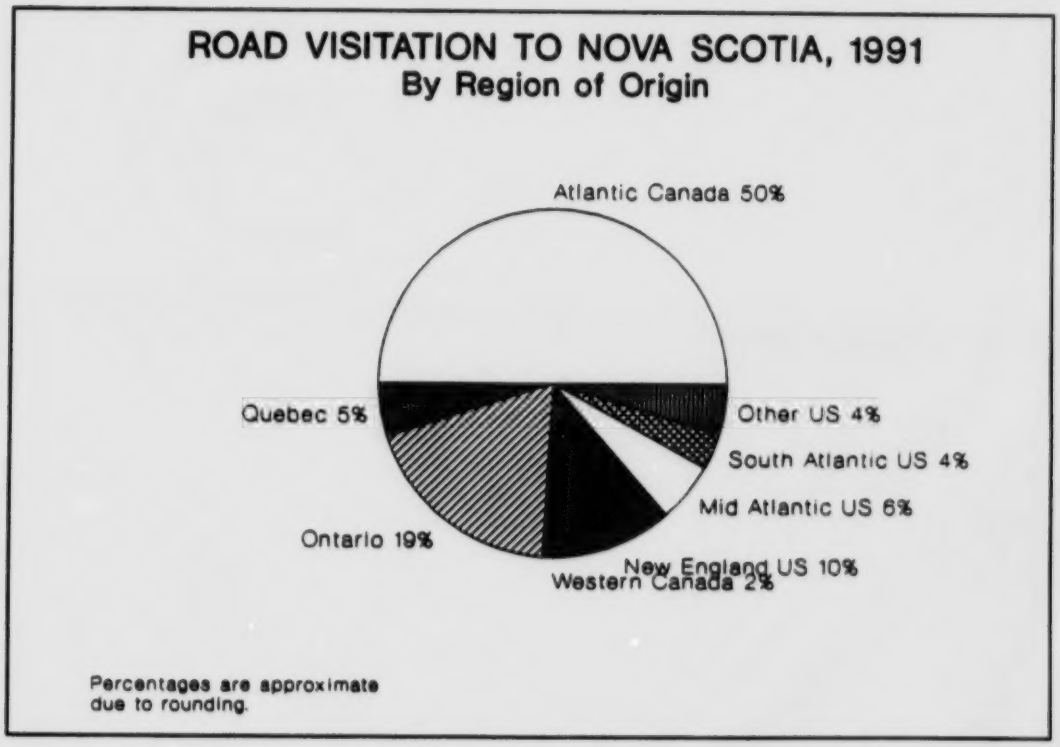


Table V-4
Road Visitation to Nova Scotia
by Region of Origin, 1990-91

Region of Origin	1990		1991	
Atlantic Canada	462,322	49.4%	457,227	49.9%
Quebec	45,837	4.9%	46,197	5.0%
Ontario	181,698	19.4%	175,009	19.1%
Western Canada	20,860	2.2%	19,363	2.1%
Total Canada	710,717	75.9%	697,796	76.2%
New England	94,657	10.1%	93,221	10.2%
Mid Atlantic	55,032	5.9%	52,317	5.7%
East North Central	18,736	2.0%	18,098	2.0%
West North Central	4,798	0.5%	5,533	0.6%
South Atlantic	33,094	3.5%	32,399	3.5%
East South Central	3,232	0.3%	3,463	0.4%
West South Central	4,601	0.5%	4,020	0.4%
Mountain	3,290	0.4%	3,074	0.3%
Pacific	7,051	0.8%	6,047	0.7%
Total United States	224,492	24.0%	218,172	23.8%
Total	936,100	99.9%	915,968	100.0%

Auto Visitors

While the number of visitors arriving in Nova Scotia by private automobile declined by 1.5% in 1991 this mode remained the dominant means of travel for non-residents visiting Nova Scotia. During the May 15 to October 31, 1991 period, approximately three quarters of all non-resident visitors (about 800,100 person-visits) came to Nova Scotia by automobile.

Auto Visitor Seasonal Patterns

July and August accounted for half of the overnight automobile visitor volume between May 15 and October 31, 1991. Another three out of ten automobile visitors to Nova Scotia came during the September/October shoulder season.

Although overall visitor volume declined in 1991, volume during May and June rose above 1990 levels. The largest decline in volume was experienced in September, when auto visitor volume fell 8.0% below 1990 levels.

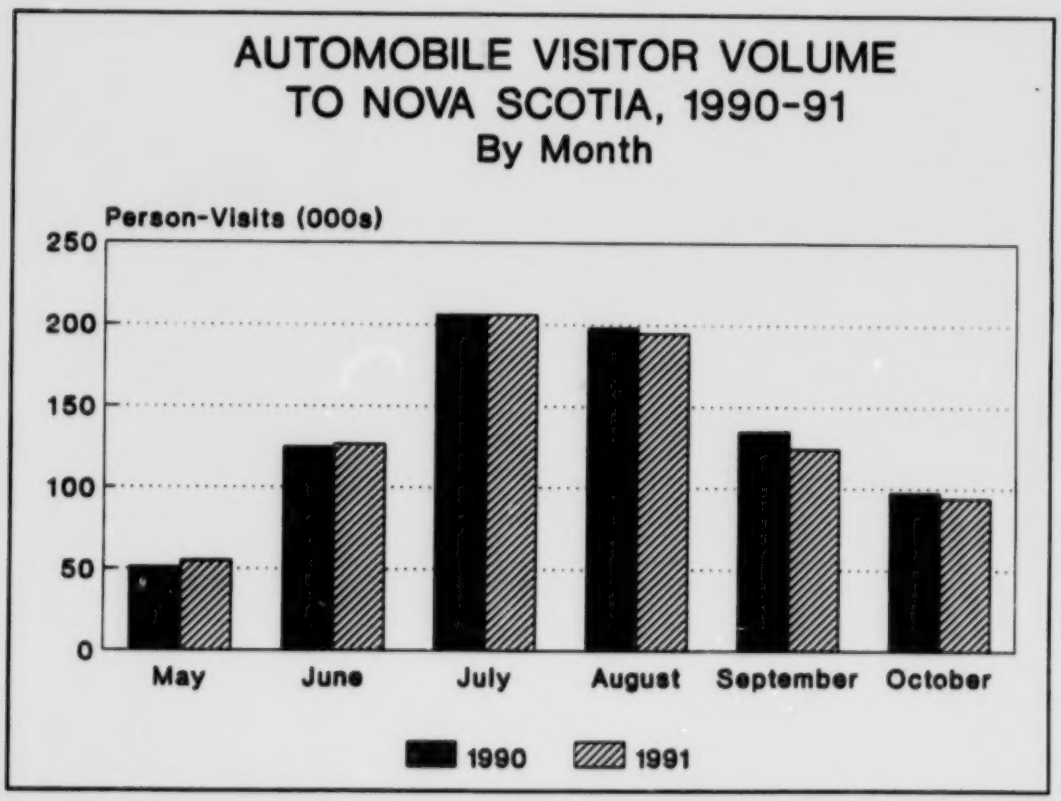
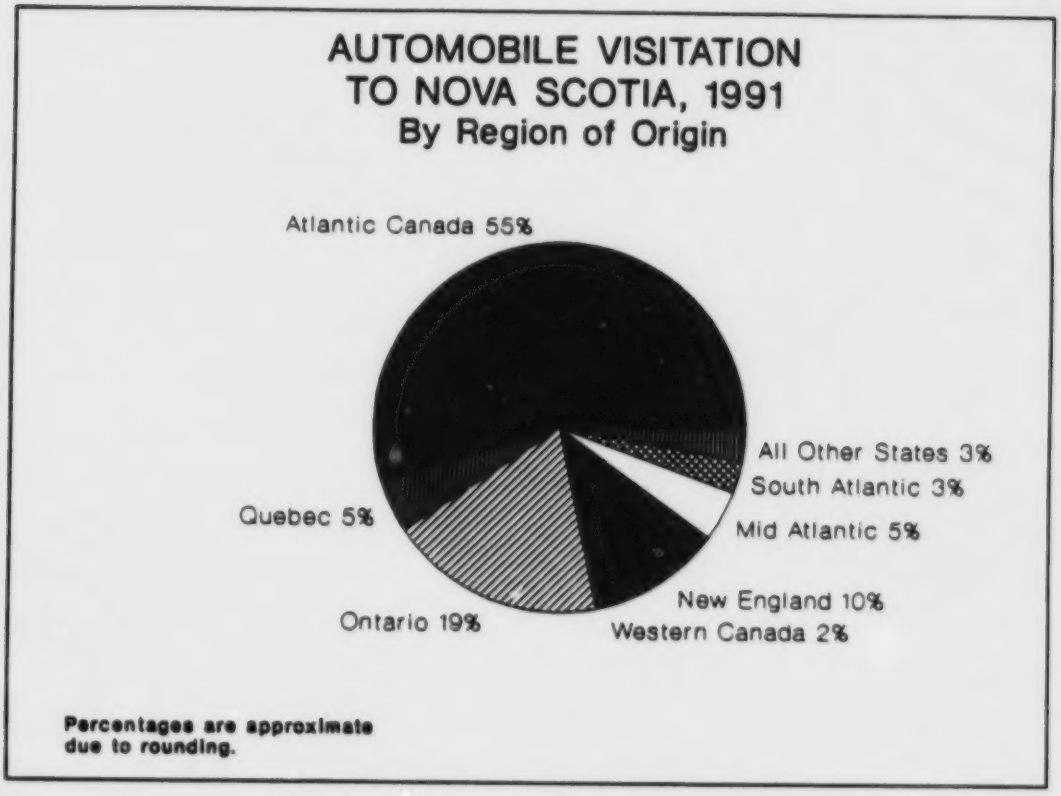


Table V-5
Automobile Visitor Volume to Nova Scotia
by Month and Entry Point, 1990-91

	May	June	July	August	September	October	Total
Amherst	39,400	81,700	125,000	118,700	79,500	69,100	513,400
Tidnish	5,600	11,800	15,800	13,800	7,900	6,800	61,700
Caribou	4,600	13,000	25,800	23,900	17,000	10,000	94,300
N. Sydney	1,900	5,700	10,400	10,300	3,500	1,800	33,600
Yarmouth	1,700	10,100	19,600	19,300	12,000	4,100	66,800
Digby	1,700	4,400	9,300	8,400	4,100	2,400	30,300
1991 Total	54,900	126,700	205,900	194,400	124,000	94,200	800,100
% of Total	6.9%	15.8%	25.7%	24.3%	15.5%	11.8%	100.0%
1990 Total	51,000	124,800	205,800	198,100	134,800	97,700	812,200
% Change	7.6%	1.5%	0.0%	-1.9%	-8.0%	-3.6%	-1.5%

Auto Visitor Origin

As in 1990, Atlantic Canada remained the largest generator of visitors to Nova Scotia, with 54.5% of overnight automobile visitors originating in either New Brunswick, Prince Edward Island, or Newfoundland. Collectively, these three provinces generated over 436,000 person-trips. The proportion of automobile visitors coming from Ontario fell slightly to 18.8%, while 5% of automobile visitors came from Quebec.



The key United States markets in 1991 remained the New England and the Middle Atlantic States, where 9.7% and 4.5% of visitors to Nova Scotia originated respectively.

Table V-6
Automobile Visitation to Nova Scotia
by Region of Origin, 1990-91

Region of Origin	1990		1991	
Atlantic Canada	437,776	53.9%	436,117	54.5%
Quebec	39,798	4.9%	39,980	5.0%
Ontario	156,755	19.3%	150,607	18.8%
Western Canada	14,620	1.8%	14,073	1.8%
Total Canada	648,948	79.9%	640,777	80.1%
New England	78,783	9.7%	77,297	9.7%
Mid Atlantic	38,173	4.7%	36,024	4.5%
East North Central	12,183	1.5%	12,103	1.5%
West North Central	2,437	0.3%	3,005	0.4%
South Atlantic	21,929	2.7%	22,406	2.8%
East South Central	1,624	0.2%	2,048	0.3%
West South Central	2,437	0.3%	2,063	0.3%
Mountain	1,624	0.2%	1,635	0.2%
Pacific	3,249	0.4%	2,728	0.3%
Total United States	162,440	20.0%	159,309	19.9%
Total	812,200	99.9%	800,086	100.0%

* Due to rounding, numbers may not always add to total.

Auto Visitor Point of Entry

More than half a million non-residents travelling by automobile entered Nova Scotia through the Amherst border crossing between May 15 and October 31, 1991. As in previous years, this entry point accounted for the majority of the province's overnight automobile visitors or 70% of Canadian and 41% of American automobile travellers. With automobile volume at Amherst up by 2.8% over the previous year, Amherst was the only entry point where an increase in automobile visitation occured during 1991.

Caribou remained the second largest overnight automobile visitor entry point, although visitor volume fell by 4.3% to an estimated 94,300 person-visits. Approximately 61,700 visitors entered the province at Tidnish by automobile in 1991, representing an 8.5% decline in arrivals at this entry point.

Yarmouth was the third largest entry point for automobiles, however volume declined by 6.6% from the previous year, to 66,800 person-visits. Yarmouth was the entry point for some 58,500 Americans visiting Nova Scotia by automobile during the May 15 - October 31 period. Digby and North Sydney experienced the largest drops in automobile visitor volume with declines of 16.1% and 14.7% respectively.

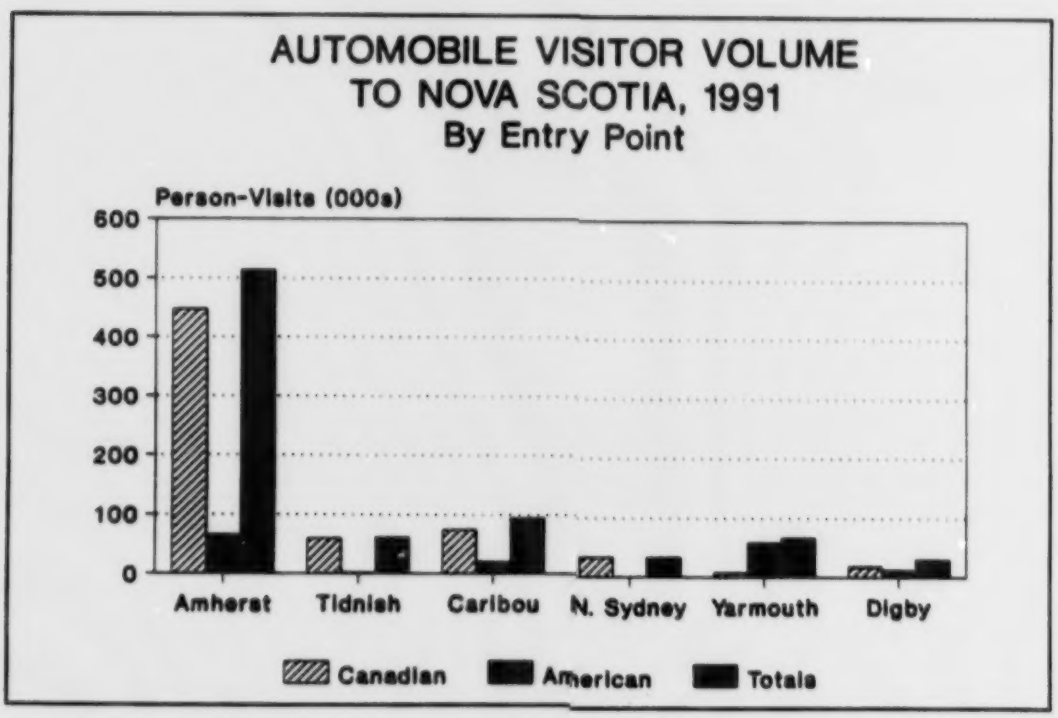


Table V-7
Canadian and American Automobile Visitor Volume to Nova Scotia by Entry Point, 1990-91

	1990	1991				'90-'91
		Canada	U.S.A.*	Total	% of Ttl	% Change
Amherst	499,300	447,500	65,900	513,400	64.2%	2.8%
Tidnish	67,400	59,800	1,900	61,700	7.7%	-8.5%
Caribou	98,500	73,800	20,500	94,300	11.8%	-4.3%
N. Sydney	39,400	33,600		33,600	4.2%	-14.7%
Yarmouth	71,500	8,300	58,500	66,800	8.3%	-6.6%
Digby	36,100	17,800	12,500	30,300	3.8%	-16.1%
Total	812,200	640,800	159,300	800,100	100.0%	-1.5%

* Americans entering Nova Scotia at North Sydney via automobile have already entered the province elsewhere and are not included in the count.

Recreational Vehicle Visitors

The decline in recreational vehicle visitation experienced during the past few years continued during 1991. Between May 15 and October 31, there were approximately 71,100 non-resident person-visits, down 9.4% from 79,100 visits in 1990. Visits by recreational vehicle accounted for about 7% of total non-resident visitor volume during the measurement period.

Recreational Vehicle Visitor Seasonal Patterns

July and August accounted for almost two thirds of recreational vehicle traveller volume in 1991. This pattern was consistent with the previous year.

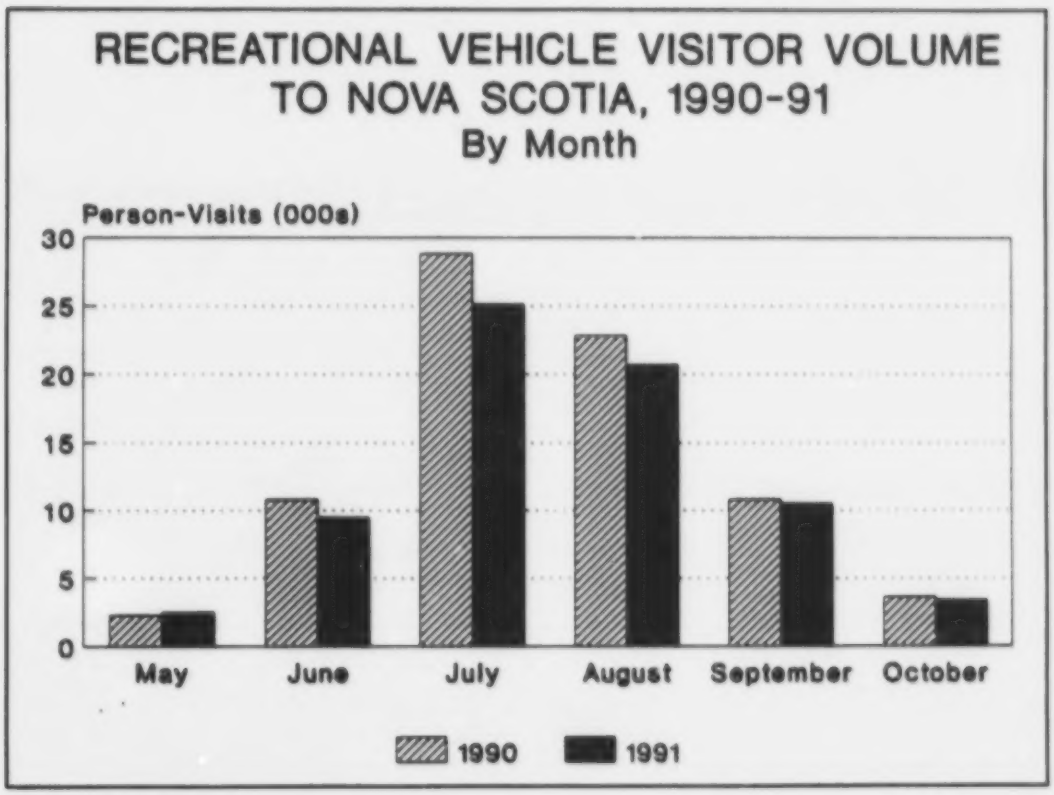


Table V-8
Recreational Vehicle Visitor Volume to Nova Scotia
by Month and Entry Point, 1990-91

	May	June	July	August	September	October	Total
Amherst	1,900	7,100	19,600	15,800	7,800	2,600	54,800
Tidnish	100	300	500	500	100	0	1,500
Caribou	100	700	2,200	2,000	1,300	300	6,600
N. Sydney	0	200	300	300	100	0	900
Yarmouth	100	400	600	500	400	100	2,100
Digby	300	800	1,900	1,600	800	400	5,800
1991 Total	2,500	9,500	25,100	20,700	10,500	3,400	71,700
% of Total	3.5%	13.2%	35.0%	28.9%	14.6%	4.7%	100.0%
1990 Total	2,300	10,800	28,800	22,800	10,800	3,600	79,100
% Change	8.7%	-12.0%	-12.8%	-9.2%	-2.8%	-5.6%	-9.4%

* Due to rounding, numbers may not always add to total.

Recreational Vehicle Visitor Origin

Compared to automobile visitation, a higher proportion of recreational vehicles entering Nova Scotia originated in the United States. In fact, in 1991, almost four in ten (38.8%) recreational vehicles came from the United States. Two thirds of American recreational travellers originated from the eastern seaboard.

Ontario accounted for over 28% of recreational vehicle visitors, making it the largest Canadian source of recreational vehicle visitors. The Quebec market generated 6.5% of all recreational vehicle traffic, while Western Canada was the source of 6.3% of recreational vehicle travellers.

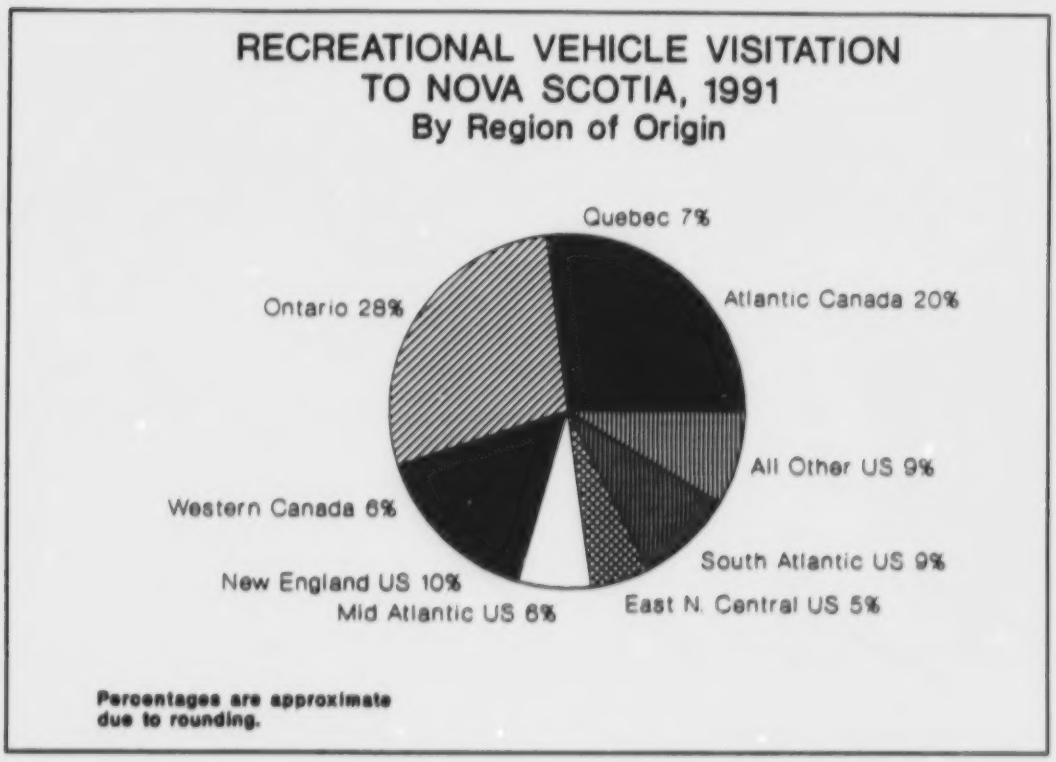


Table V-9
Recreational Vehicle Visitation to Nova Scotia
by Region of Origin, 1990-91

Region of Origin	1990		1991	
Atlantic Canada	17,244	21.8%	14,624	20.4%
Quebec	4,113	5.2%	4,659	6.5%
Ontario	20,329	25.7%	20,108	28.0%
Western Canada	5,300	6.7%	4,514	6.3%
Total Canada	46,985	59.4%	43,905	61.2%
New England	7,989	10.1%	6,977	9.7%
Mid Atlantic	5,300	6.7%	4,619	6.4%
East North Central	3,955	5.0%	3,698	5.2%
West North Central	1,107	1.4%	994	1.4%
South Atlantic	7,356	9.3%	6,299	8.8%
East South Central	712	0.9%	513	0.7%
West South Central	1,582	2.0%	1,220	1.7%
Mountain	949	1.2%	834	1.2%
Pacific	3,085	3.9%	2,629	3.7%
Total United States	32,036	40.5%	27,783	38.8%
Total	79,100	99.9%	71,688	100.0%

* Due to rounding, numbers may not always add to total.

Recreational Vehicle Visitor Point of Entry

The decline in recreational vehicle traveller volume occurred at all entry points. The smallest decline occurred witnessed at Digby, where volume dropped by 7.9% to 5,800 person-visits. Amherst, which accounted for three quarters of all recreational vehicle traffic to Nova Scotia (or 54,800 person-visits), experienced a decline of 8.1%.

Caribou, the second highest volume point of entry for recreational vehicles with 9.2% of the total recreational vehicle volume, experienced a 12% decline between May 15 - October 31 compared to the period in 1990.

North Sydney experienced an 18.2% decline in recreational vehicle entries, although this figure included only visitors from Newfoundland and Labrador. The sharpest decline in recreational vehicle visitor volume occurred at Yarmouth, where 2,100 visitors entered by recreational vehicle, a 27.6% drop.

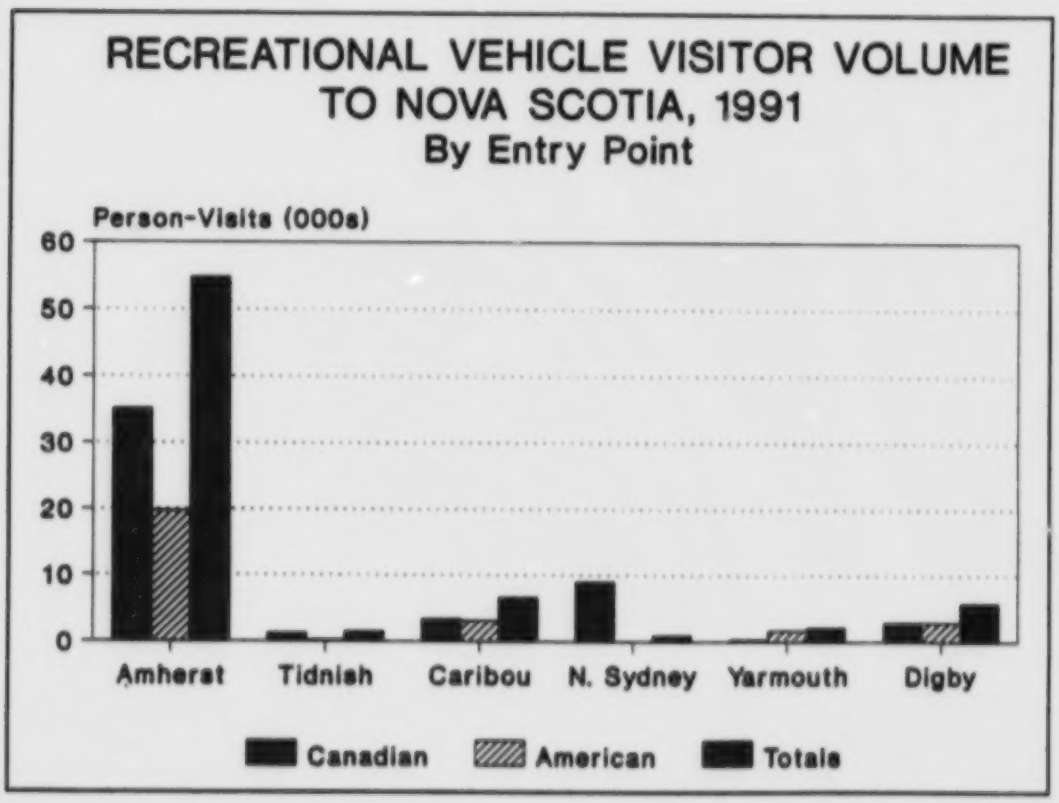


Table V-10
Canadian and American Recreational Vehicle Visitor Volume to Nova Scotia by Entry Point, 1990-91

	1990	1991				'90-'91
		Canada	U.S.A.	Total	% of Ttl	% Change
Amherst	59,600	35,100	19,700	54,800	76.4%	-8.1%
Tidnish	1,700	1,200	300	1,500	2.1%	-11.8%
Caribou	7,500	3,400	3,200	6,600	9.2%	-12.0%
N. Sydney	1,100	900	0	900	1.3%	-18.2%
Yarmouth	2,900	400	1,700	2,100	2.9%	-27.6%
Digby	6,300	2,900	2,900	5,800	8.1%	-7.9%
Total	79,100	43,900	27,800	71,700	100.0%	-9.4%

* Americans entering Nova Scotia at North Sydney via recreational vehicle have already entered the province elsewhere and are not included in the count.

Motorcoach Visitors

Motorcoach visitor volume declined in 1991 for the second consecutive year. Between May 15 and October 31, the volume dropped to 44,200 person-visits, from 44,800 in 1990 - a fall of 1.3%. Motorcoaches accounted for approximately 4.1% of the total visitor volume in 1991.

Motorcoach Visitor Seasonal Patterns

July and August remain the busiest part of the year for motorcoach tours with some 46% of the coaches arriving during these months. However, almost as many (40% of total motorcoach tours) arrived during the September - October shoulder season. This pattern was consistent with the previous year.

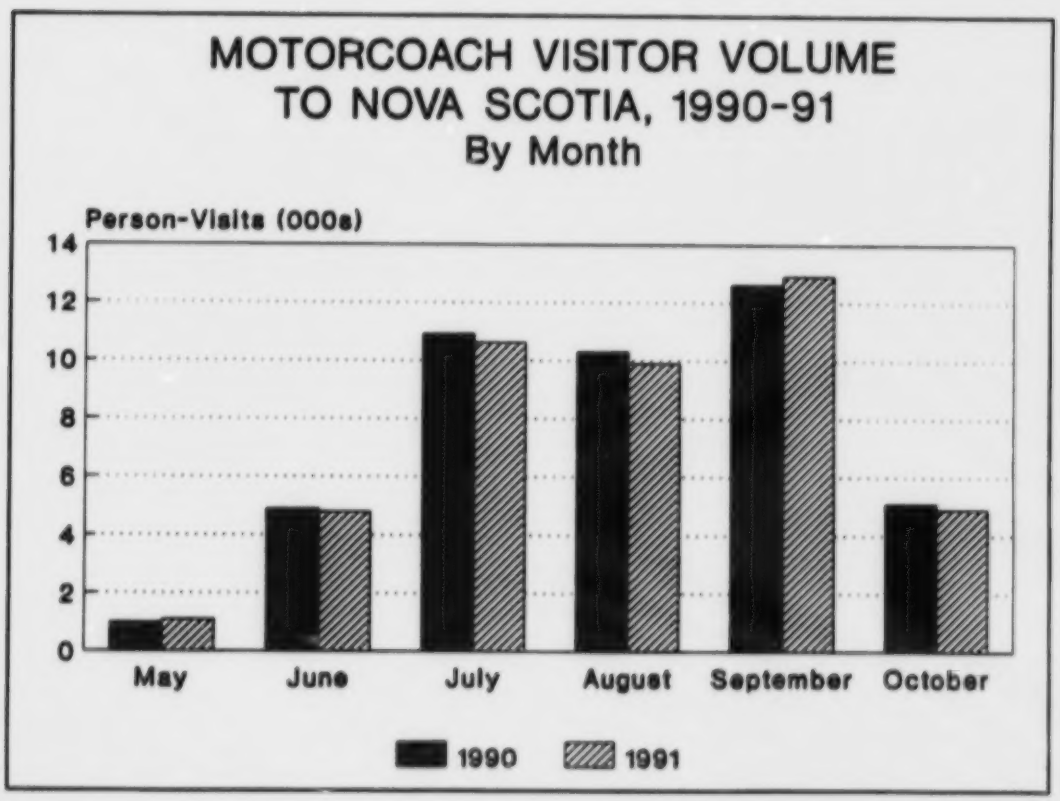


Table V-11
Motorcoach Visitor Volume to Nova Scotia
by Month and Entry Point, 1990-91

	May	June	July	August	September	October	Total
Amherst	400	1,900	2,400	2,900	3,600	2,000	13,200
Tidnish	0	0	100	100	0	0	200
Caribou	0	300	900	1,000	1,400	500	4,100
N. Sydney	100	0	200	0	0	0	300
Yarmouth	600	2,400	5,700	5,000	6,600	1,900	22,200
Digby	0	200	1,300	900	1,300	500	4,200
1991 Total	1,100	4,800	10,600	9,900	12,900	4,900	44,200
% of Total	2.5%	10.9%	24.0%	22.4%	29.2%	11.1%	100.0%
1990 Total	1,000	4,900	10,900	10,300	12,600	5,100	44,800
% Change	10.0%	-2.0%	-2.8%	-3.9%	2.4%	-3.9%	-1.3%

* Due to rounding, numbers may not always add to total.

Motorcoach Visitor Origin

The motorcoach market continued to represent the only segment of the travel industry for which the majority of visitors came from the United States.

Seven in ten motorcoaches arriving during the May 15 - October 31 period were American, including 55% from the eastern seaboard alone. Along the eastern seaboard, the Mid-Atlantic states of New York, New Jersey, and Pennsylvania accounted for more than one quarter of all motorcoach visitors to Nova Scotia. A further 20% of motorcoach traffic originated in the New England states, while the South Atlantic states accounted for another 8%.

The remaining three in ten non-residents arriving by motorcoach originated in Canada, with Atlantic Canada accounting for 15% and Ontario 10%.

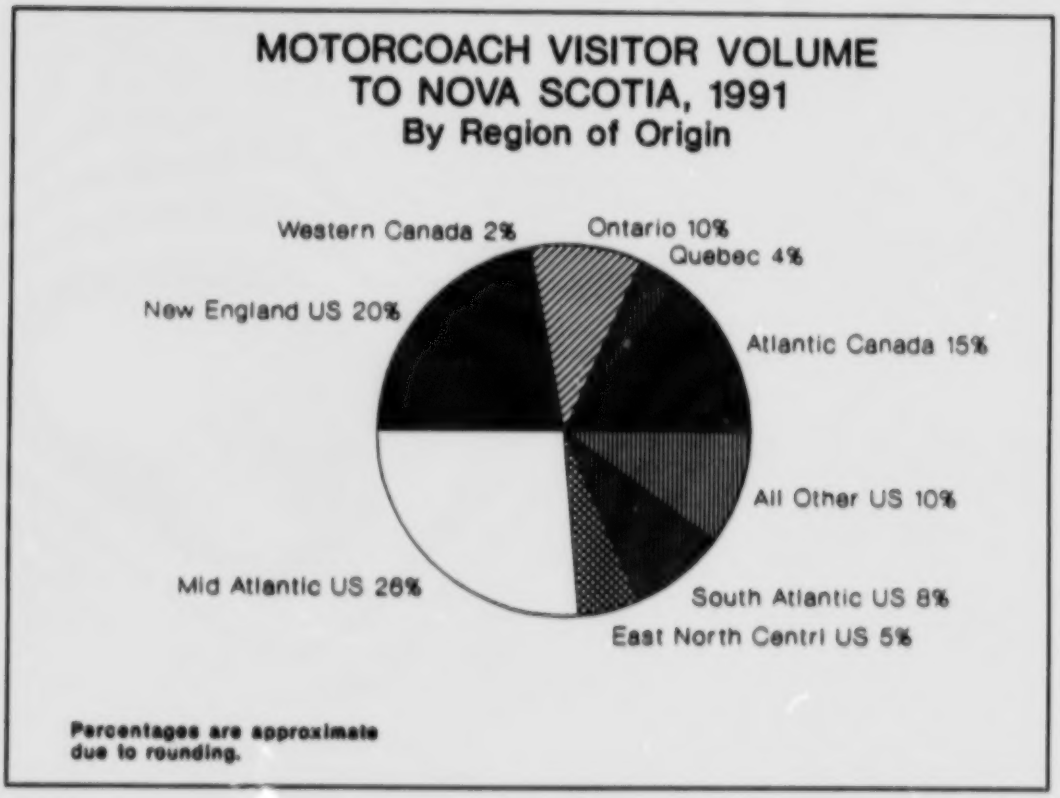


Table V-12
Motorcoach Visitation to Nova Scotia
by Region of Origin, 1990-91

Region of Origin	1990		1991	
Atlantic Canada	7,302	16.3%	6,535	14.8%
Quebec	1,926	4.3%	1,559	3.5%
Ontario	4,614	10.3%	4,294	9.7%
Western Canada	941	2.1%	775	1.8%
Total Canada	14,784	33.0%	13,163	29.8%
New England	7,885	17.6%	8,947	20.2%
Mid Atlantic	11,558	25.8%	11,675	26.4%
East North Central	2,598	5.8%	2,297	5.2%
West North Central	1,254	2.8%	1,534	3.5%
South Atlantic	3,808	8.5%	3,693	8.3%
East South Central	896	2.0%	902	2.0%
West South Central	582	1.3%	738	1.7%
Mountain	717	1.6%	605	1.4%
Pacific	717	1.6%	691	1.6%
Total United States	30,016	67.0%	31,082	70.2%
Total	44,800	100.0%	44,245	100.0%

Motorcoach Visitor Point of Entry

One half of all motorcoach tours arriving in Nova Scotia during the May 15 - October 31 period entered the province at Yarmouth. Furthermore, the Yarmouth entry point accounted for two thirds of all American motorcoach tours entering Nova Scotia. Yarmouth was also the only entry point which had an increase in motorcoach visitation, with activity levels 3.3% higher than those achieved during the previous year.

At Amherst, the second most frequent point of entry for motorcoach tours, volume declined by 3.6% for this mode of travel. It remained the primary entry point for Canadian motorcoach arrivals with six in ten of these visitors having entered Nova Scotia there.

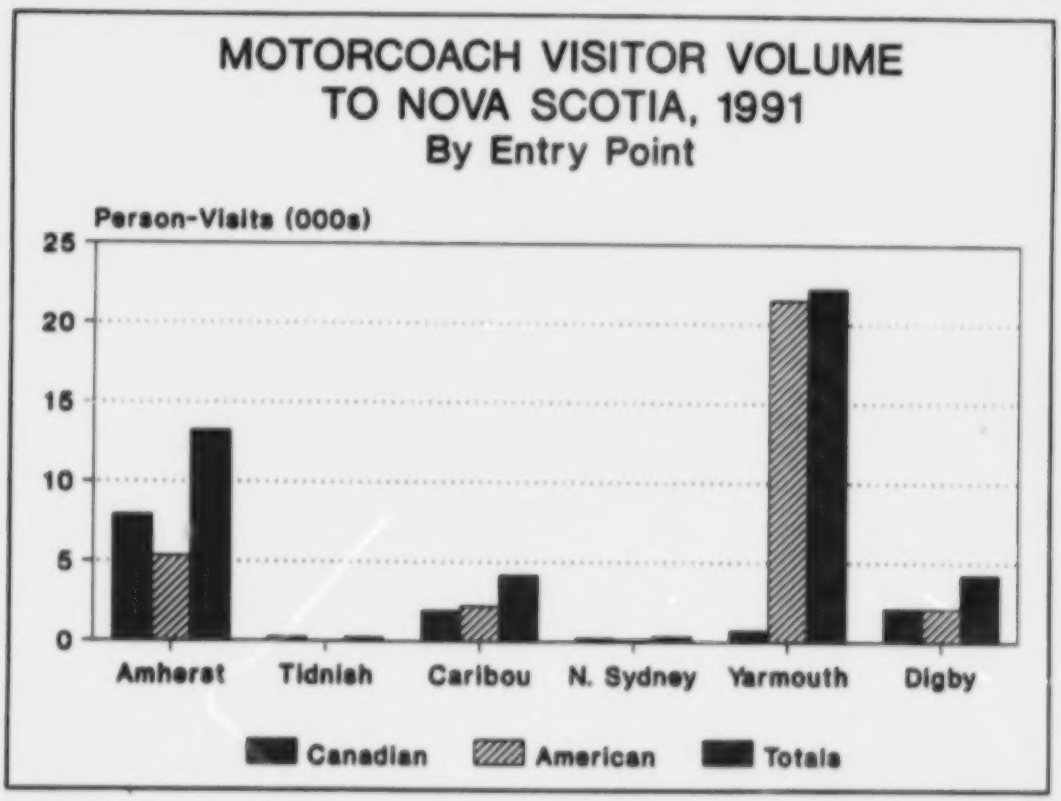


Table V-13
Canadian and American Motorcoach Visitor Volume
by Entry Point, 1990-91

	1990	1991				'90-'91
		Canada	U.S.A.*	Total	% of Ttl	% Change
Amherst	13,700	7,900	5,300	13,200	29.8%	-3.6%
Tidnish	200	200	0	200	0.5%	0.0%
Caribou	4,200	1,900	2,200	4,100	9.3%	-2.4%
N. Sydney	700	200	100	300	0.7%	-57.1%
Yarmouth	21,500	700	21,500	22,200	50.2%	3.3%
Digby	4,500	2,100	2,100	4,200	9.5%	-6.7%
Total	44,800	13,000	31,200	44,200	99.9%	-1.3%

* Americans entering Nova Scotia at North Sydney via motorcoach have already entered the province elsewhere and are not included in the count.

AIR VISITOR VOLUME

Despite a substantial decrease, air travel remained the second largest mode of transportation for visitors to Nova Scotia between May 15 and October 31, 1991. Air visitation declined from 215,000 visitors in 1990 to 158,000 in 1991.

The decline in air travel manifested itself in two ways. First, there was an overall decline in the number of air passengers passing through the Halifax International Airport. Secondly, compared to the previous year, a higher proportion of air travellers proceeded to other destinations without an overnight stay in Nova Scotia. The effect of this decline on other indicators such as room sales was offset somewhat by an increased length of stay for air travellers in 1991.

Air Visitor Origin

Three quarters (74.8%) of all non-resident air travellers to Nova Scotia originated from Canada. Ontario accounted for 37.8%, Western Canada 16.2%, and Atlantic Canada 12.8%, while 8.0% came from Quebec . The proportion of air travellers visiting Nova Scotia from the United States decreased to 18.1% in 1991, from 19.4% in 1990. The remaining 7.1% of non-resident air travellers were from offshore - the United Kingdom, Europe, and other overseas countries.

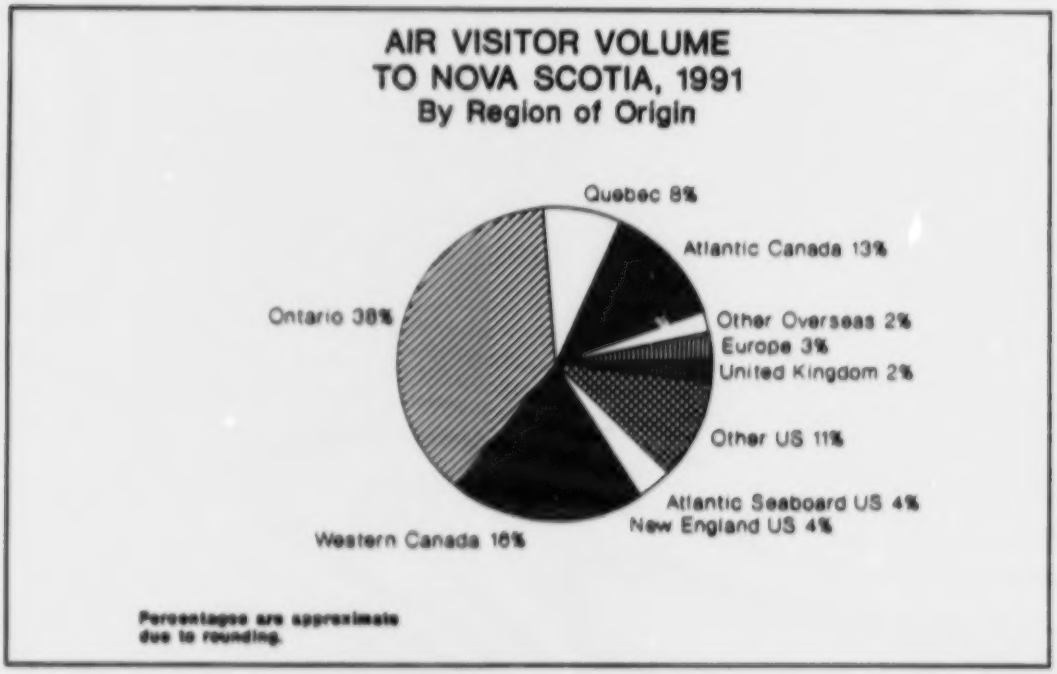


Table V-14
Air Visitation to Nova Scotia
by Region of Origin, 1990-91

Region of Origin	1990		1991	
Atlantic Canada	27,090	12.6%	20,224	12.8%
Quebec	15,480	7.2%	12,640	8.0%
Ontario	75,035	34.9%	59,724	37.8%
Western Canada	36,765	17.1%	25,596	16.2%
Total Canada	154,370	71.8%	118,184	74.8%
New England	10,965	5.1%	5,846	3.7%
Mid Atlantic	8,600	4.0%	6,162	3.9%
East North Central	3,440	1.6%	4,424	2.8%
West North Central	1,935	0.9%	948	0.6%
South Atlantic	8,600	4.0%	4,740	3.0%
East South Central	1,290	0.6%	948	0.6%
West South Central	1,075	0.5%	1,422	0.9%
Mountain	1,075	0.5%	948	0.6%
Pacific	4,730	2.2%	3,160	2.0%
Total United States	41,710	19.4%	28,598	18.1%
United Kingdom	9,890	4.6%	3,476	2.2%
Europe	5,375	2.5%	4,424	2.8%
Other Overseas	3,010	1.4%	3,318	2.1%
Total Offshore	18,275	8.5%	11,218	7.1%
Total	215,000	99.7%	158,000	100.0%

* Due to rounding, numbers may not always add to total.

Air Visitor Trip Purpose

Almost three in ten air travellers to Nova Scotia cited visiting friends or relatives as the primary purpose of their trip. Another three in ten visitors indicated pleasure or recreation as their main reason for coming to Nova Scotia. Conventions drew one quarter of the air visitors during the measurement period, while general business (selling, meetings, etc.) accounted for 14%. The remaining 5% of non-resident air travellers cited a variety of other reasons for visiting Nova Scotia, such as just passing through or personal business.

Table V-15
Air Visitation to Nova Scotia
by Trip Purpose, 1991

Trip Purpose	% of Total
Visiting Friends/Relatives	28%
Pleasure/Recreation	28%
Convention	25%
Business (Selling, etc.)	14%
Just Passing Through	2%
Personal Matters	1%
Other	2%
Total	100%

Air Visitor Length of Stay

The average stay in Nova Scotia for non-resident air travellers was 9.7 nights. Half the air travellers stayed 5 nights or less, three in ten stayed 6 to 10 nights, 10% stayed 11 to 15 nights, and the remaining 10% stayed longer than 15 nights.

Table V-16
Air Visitation to Nova Scotia
by Length of Stay, 1991

Nights	
2 or less	27 %
3 to 5	24 %
6 to 10	29 %
11 to 15	10 %
16 to 25	5 %
26 or more	5 %
Total	100 %
Average Stay	9.7 nights

Air Visitor Party Size

The average party size for non-resident air travellers was 1.6 people. More than nine out of every ten travellers surveyed indicated their party size was either one or two people.

Table V-17
Air Visitation to Nova Scotia
by Party Size, 1991

Number of People	
1	59 %
2	32 %
3	4 %
4	3 %
5 or more	2 %
Total	100 %
Average Size	1.6 People

* Due to rounding, numbers may not always add to total.

APPENDIX:

VISITOR VOLUME

REGIONS OF ORIGIN

Description of Regions of Origin

Atlantic Canada	New Brunswick, Newfoundland and Labrador, Prince Edward Island. For this report, Nova Scotia is excluded from the Atlantic Canada grouping.
Western Canada	Manitoba, Saskatchewan, Alberta, British Columbia, North West Territories, Yukon
New England	Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut
Middle Atlantic	New York, New Jersey, Pennsylvania
East North Central	Ohio, Indiana, Illinois, Michigan, Wisconsin
West North Central	Minnesota, Iowa, Missouri, North Dakota, South Dakota, Nebraska, Kansas
South Atlantic	Delaware, Maryland, District of Columbia, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Florida
East South Central	Kentucky, Tennessee, Alabama, Mississippi
West South Central	Arkansas, Louisiana, Oklahoma, Texas
Mountain	Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Nevada
Pacific	Alaska, Washington, Oregon, California, Hawaii

1991 NOVA SCOTIA

FIXED-ROOF

ACCOMMODATION REPORT

Research Section

Nova Scotia Department
of Tourism and Culture

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FORWARD

The Nova Scotia Department of Tourism and Culture has monitored fixed-roof accommodation performance in the province since the early 1960s. Accommodation statistics are a key indicator in gauging both the overall performance of the tourism industry in Nova Scotia and the activity levels within the various tourism regions.

This report consists of two main components. The first details the inventory of licensed properties and rooms available in the province. This information is collected by the Department's Training and Inspection Services Section, which is responsible for licensing those fixed-roof accommodation properties with three or more rooms. The section provides a complete overview of properties operating throughout the province by type, region and county.

The second component of the report presents a summary of industry performance and trends in demand for fixed-roof properties including room sales and occupancy rates by month, property type, and tourism region. This information is generated from monthly occupancy reports sent by operators to the Department's Research Section. The Department gratefully acknowledges the co-operation of accommodation operators in supplying this invaluable information.

The report contains a number of terms that have specific meaning in the context of the accommodation sector. For an explanation, please consult the Glossary of Terms contained in the appendix (page 21).

The *Accommodation Report* is one of four documents which collectively form the *Tourism Statistical Review*. Other documents which comprise the *Tourism Statistical Review* and which are also available under separate cover include the *Economic Impact Report*, the *Visitor Volume Report*, and the *Campground Report*.

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ACCOMMODATION SUPPLY

Overview of Fixed-Roof Accommodation Supply

In 1991, there were 657 fixed-roof accommodation properties operating in Nova Scotia offering 12,911 rooms. The number of properties increased by 3.8% over 1990, while the number of rooms available grew by 1.9%.

Table A-1
Summary of Fixed-Roof Accommodation Supply, 1990-91

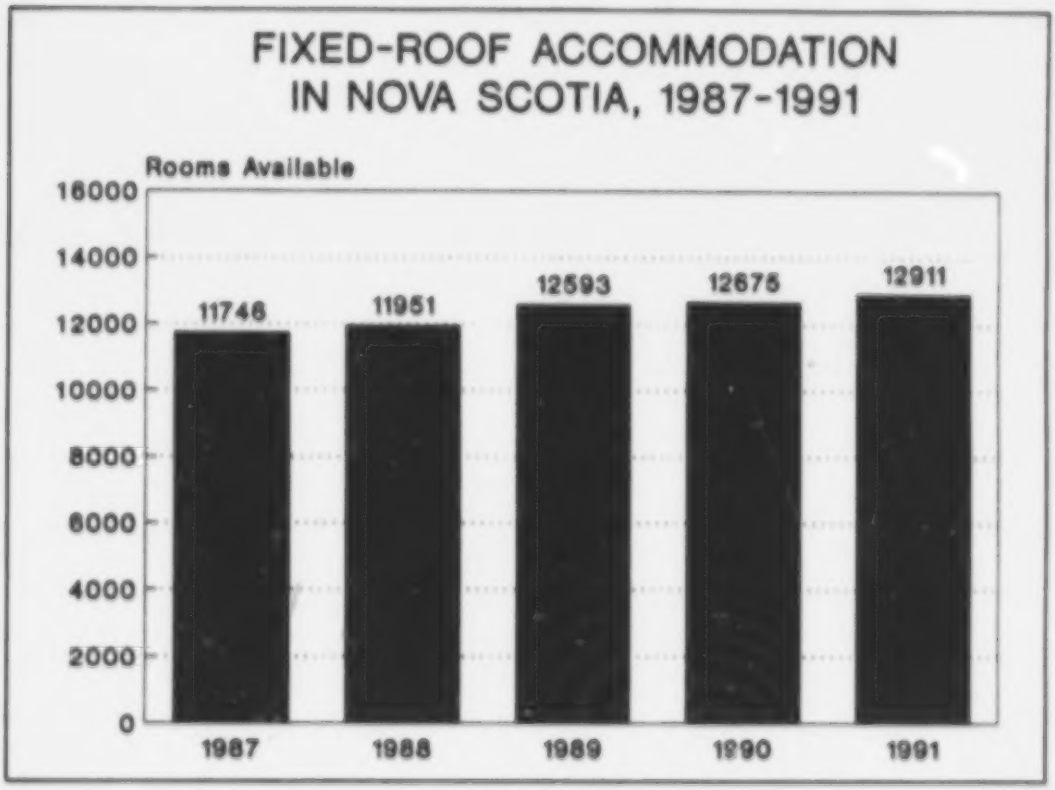
	1990	1991
Number of Fixed-Roof Accommodations	633	657
Increase in Rooms (from previous year)	514	506
Decrease in Rooms (from previous year)	432	270
Net Change in Rooms (from previous year)	82	236
Number of Rooms for Sale (1)	12,675	12,911
Number of Year Round Fixed-Roof Accommodations	342	352
Number of Seasonal Fixed-Roof Accommodations	291	305

(1) If a cottage has two bedrooms in one unit and it is always rented as one unit, the cottage is considered as one room for sale.

Table A-2
Number of Fixed-Roof Accommodations Offering Various Facilities, 1990-91

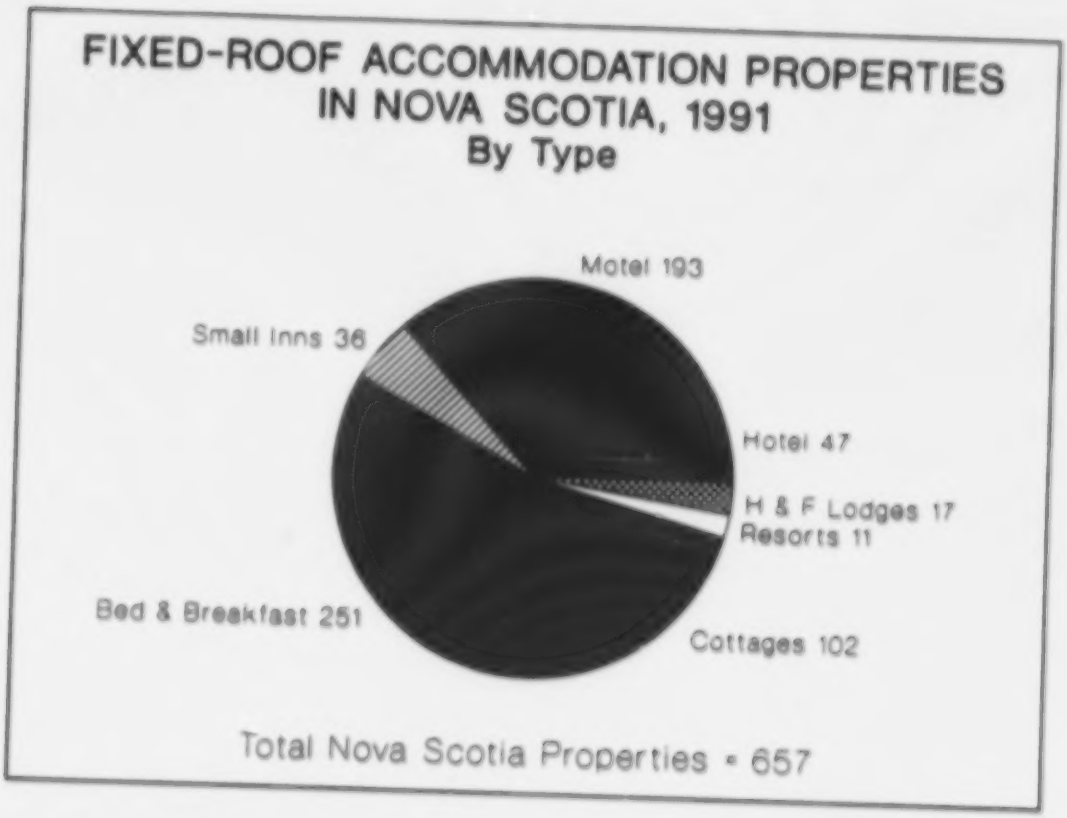
		1990	1991
Bath:	Private	361	420
	Shared	239	234
	Combination Shared/Private Bath	33	56
Housekeeping Facilities		179	191
Swimming Pool:	Indoor	39	41
	Outdoor	74	72
Meals:	Breakfast	458	431
	Lunch	163	165
	Dinner	199	191

The number of fixed-roof accommodation rooms available in Nova Scotia grew steadily between 1986 and 1991. During this period, the number of fixed-roof rooms increased 13.5% or on average, 2.6% annually.



Supply by Type of Fixed-Roof Accommodation

Hotels and motels accounted for the majority of the total room supply (35% and 42%, respectively) in 1991. Bed and breakfasts accounted for another 7% of total rooms, cottages 6%, and resorts 6%. Small inns (3% of total rooms available) and hunting and fishing lodges (less than 1% of total room supply), remained the smallest segments of the fixed-roof accommodation sector in 1991.



Some of the smaller segments of the fixed-roof accommodation sector experienced significant growth in room capacity during 1991. The number of rooms operated under resort licenses reached 756 in 1991 - an increase of 24.8%. Similarly, overall capacity in small inns increased by 20.9% over 1990, to 360 rooms. The supply of rooms was more stable in the major categories such as hotels (-2.3%) and motels (+0.9%).

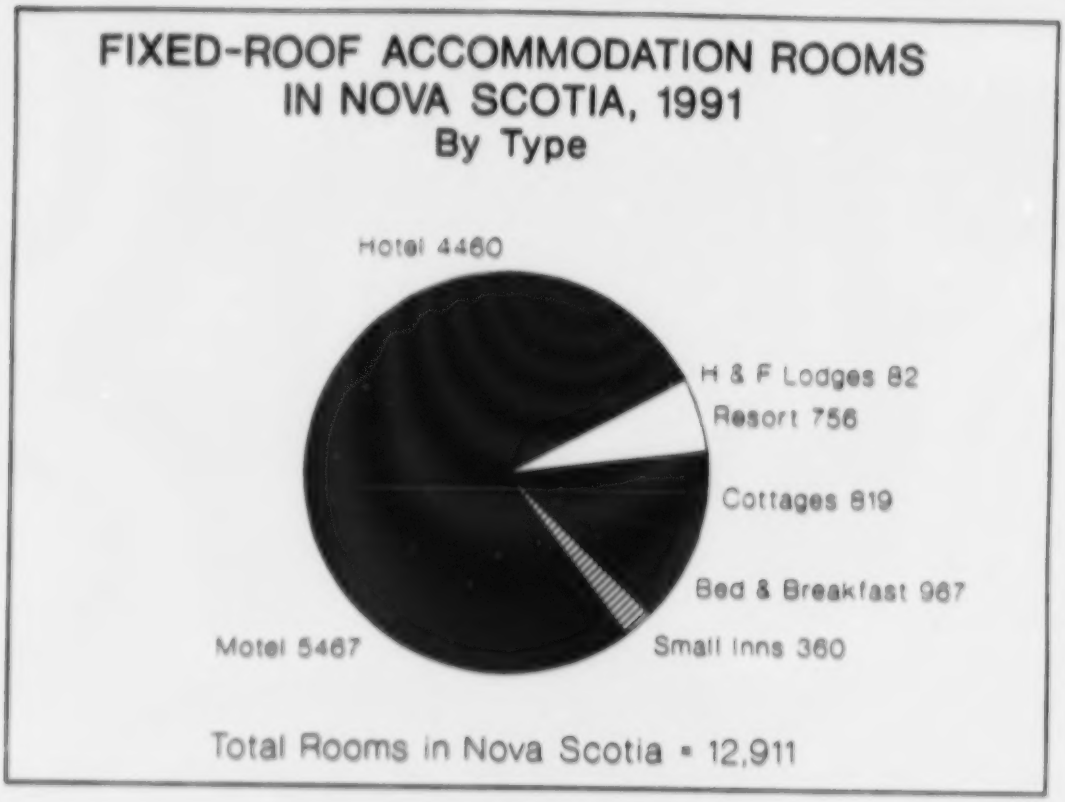


Table A-3
Fixed-Roof Accommodation Properties and Rooms
by Classification, 1990-91

	Hotel	Motel	Sm Inns	B & B	Cottages	Resorts	H & F Lodges	Total
Properties								
1990	54	192	26	235	101	9	16	633
1991	47	193	36	251	102	11	17	657
Net Change	-7	+1	+10	+16	+1	+2	+1	+24
% Change	-12.0%	+.5%	+38.5%	+6.8%	+1.0%	+22.2%	+6.3%	3.8%
Rooms								
1990	4,569	5,417	298	898	808	606	79	12,675
1991	4,460	5,467	360	967	819	756	82	12,911
Net Change	-109	+50	+62	+69	+11	+150	+3	+236
% Change	-2.3%	+0.9%	+20.9%	+7.7%	+1.4%	+24.8%	+3.8%	+1.9%

Table A-4
Increase/Decrease in Fixed-Roof Accommodation Properties & Rooms by Classification, 1991

	Increases		Decreases		Net Change In Rooms
	Prop.	Rooms	Prop.	Rooms	
Hotels	N 2 A 3	255 5	C 3 R 7	27 42	+191
Motels	N 2 A 5	13 13	C 1 R 9	89 38	- 71
Small Inns	N 4 A 1	16 1	C 0 R 4	0 12	+ 5
B&B	N 32 A 7	113 7	C 16 R 6	58 12	+ 49
Cottages	N 6 A 12	26 15	C 5 R 1	16 2	+ 23
Resorts	N 1 A 1	16 24	C 0 R 1	0 4	+ 36
Hunting/Fishing Lodges	N 1 A 0	3 0	C 0 R 0	0 0	+ 3
Total	N 47 A 25	442 64	C 25 R 28	160 110	+236

N = New A = Additions C = Closed R = Reduced

Table A-5
Increase/Decrease in Fixed-Roof Accommodation Rooms by Classification, 1990-91

	Increases		Decreases		Net Change	
	1990	1991	1990	1991	1990	1991
Hotels	63	260	34	69	+ 29	+191
Motels	220	26	244	97	+ 24	- 71
Small Inns	16	17	9	12	+ 7	+ 5
B&B	124	119	87	70	+ 37	+ 49
Cottages	71	41	55	18	+ 16	+ 23
Resorts	10	40	0	4	10	+ 36
H&F Lodges	10	3	3	0	+ 7	+ 3
Total	514	506	432	270	+ 82	+236

Supply by Size of Fixed-Roof Accommodation

Table A-6
Fixed-Roof Accommodation
by Size, 1990-91

Number of Rooms	1990 #	1990 %	1991 #	1991 %
3 - 10	418	66%	434	66%
11 - 20	78	12%	79	12%
21 - 30	38	6%	39	6%
31 - 40	22	3%	22	3%
41 - 50	20	3%	1	3%
51 - 60	7	1%	8	1%
61 - 70	12	2%	13	2%
71 - 80	10	2%	11	2%
81 - 90	5	1%	4	1%
91 - 100	2	0%	3	0%
101 - 150	9	1%	10	2%
151 - 200	3	0%	4	1%
201 - 300	6	1%	6	1%
300 +	3	0%	3	0%
Total	633	100%	657	100%

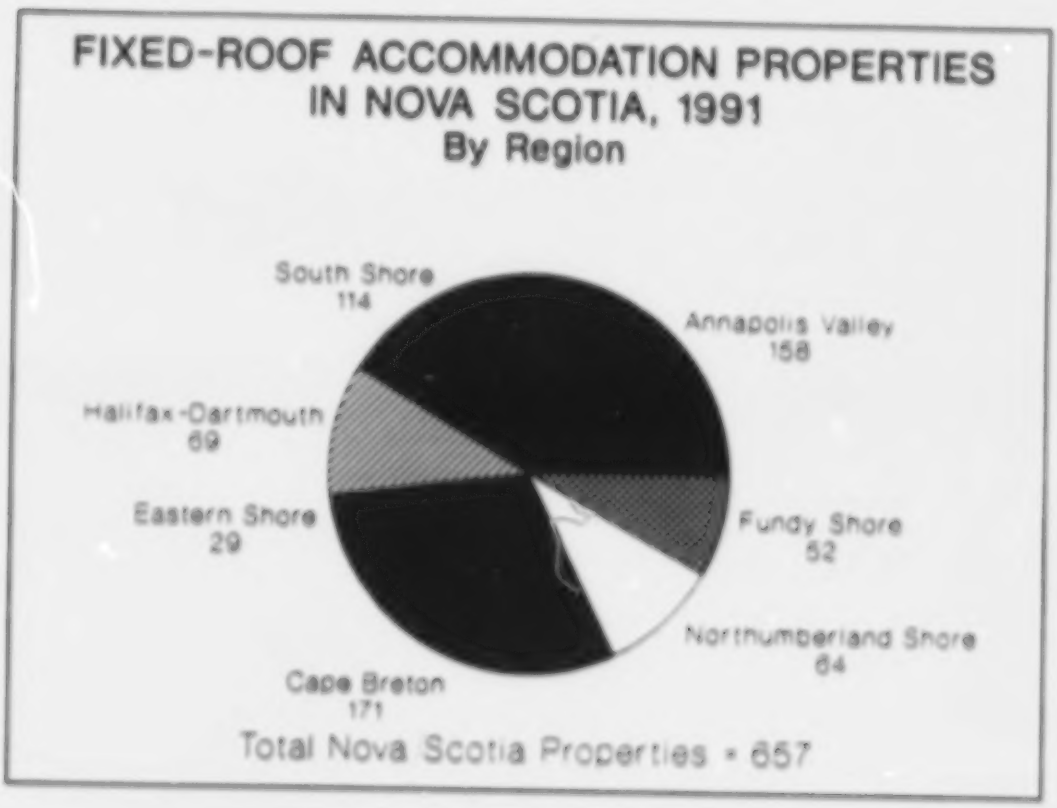
Table A-7
Average Number of Rooms
by Classification, 1990-91

Average no. of Rooms	1990	1991
Hotels	84.6	94.8
Motels	28.2	28.3
Small Inns	11.4	10.0
B&Bs	3.8	3.8
Cottages	8.0	8.3
Resorts	67.3	68.7
H & F Lodges	4.9	4.8
Overall	20.0	19.6

Fixed-Roof Accommodation Supply by Region

Regionally, Halifax-Dartmouth accounts for 34% of rooms available, Cape Breton 24%, Annapolis Valley 17%, South Shore 9%, Fundy Shore 8%, Northumberland Shore 7%, and Eastern Shore 2%.

Growth in room supply between 1990 and 1991 was greatest in the Halifax-Dartmouth Region, where the number of rooms available increased by 5%. The Northumberland Shore experienced a 4% increase, with the Eastern Shore increasing by 2.5%, the South Shore increasing by 1.7% and Cape Breton experiencing a 0.8% increase. The supply of rooms decreased in the Annapolis Valley by 1.9% and on the Fundy Shore by 1.3%.



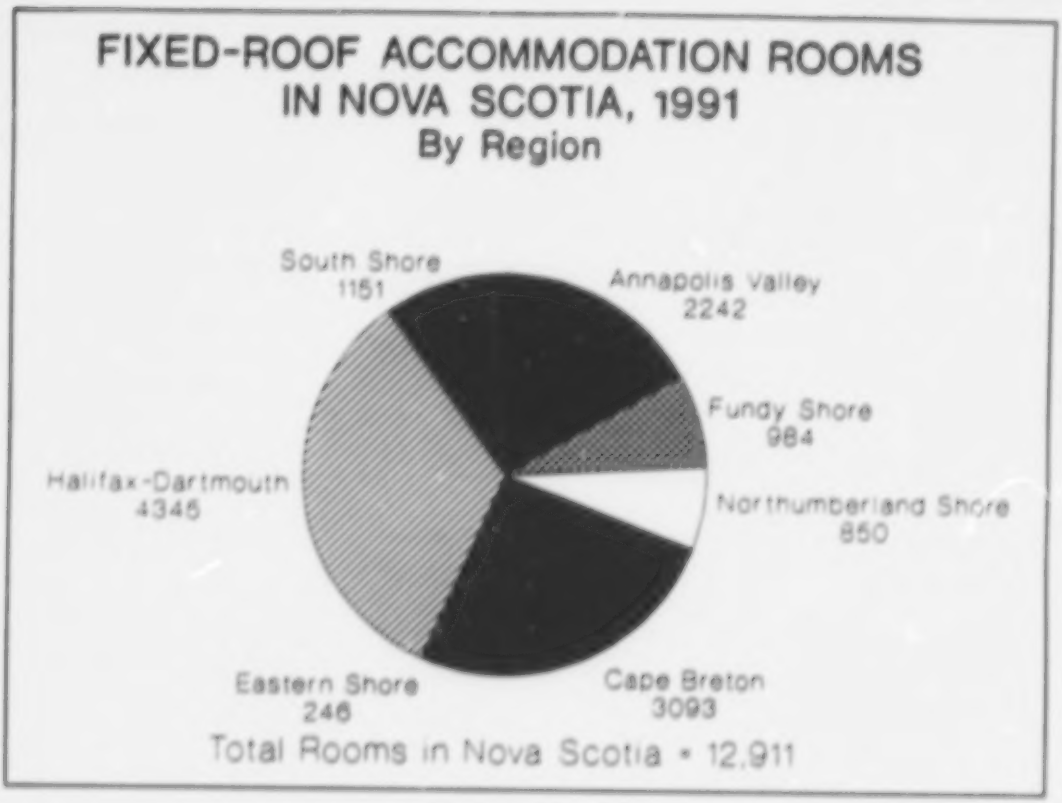


Table A-8
Fixed-Roof Accommodation Rooms
by Region, 1990-91

	Annapolis Valley (AV)	South Shore (SS)	Hfx. Dart. (HD)	Eastern Shore (ES)	Cape Breton (CB)	North. Shore (NS)	Fundy Shore (FS)	Total
1991	2,242	1,151	4,345	246	3,093	850	984	12,911
1990	2,285	1,131	4,140	240	3,066	816	997	12,675
Net Change	-43	+20	+205	+6	+27	+34	-13	+ 236
% Change	-1.9%	1.7%	5.0%	2.5%	+0.8%	+4.0%	-1.3%	1.9%

Table A-9
Fixed-Roof Accommodation Properties and Rooms
by Region and Classification, 1991

	Hotel		Motel		Small Inns		B & B	
	Prop	Rms	Prop	Rms	Prop	Rms	Prop	Rms
Annapolis Valley	4	262	45	1,187	13	119	71	263
South Shore	3	94	28	576	10	80	55	200
Hfx. - Dart.	23	3,309	18	816	2	61	23	134
Eastern Shore	1	10	6	65	2	11	9	29
Cape Breton	14	665	54	1,466	5	45	44	172
Northumberland	1	30	20	593	2	30	29	106
Fundy Shore	1	90	22	764	2	14	20	63
TOTAL	47	4,460	193	5,467	36	360	251	967

	Cottages		Resorts		H&F Lodges		Total	
	Prop	Rms	Prop	Rms	Prop	Rms	Prop	Rms
Annapolis Valley	18	162	2	227	5	22	158	2,242
South Shore	13	92	2	96	3	13	114	1,151
Hfx. - Dart.	3	25	0	0	0	0	69	4,345
Eastern Shore	6	36	2	86	3	9	29	246
Cape Breton	46	380	5	347	3	18	171	3,093
Northumberland	11	87	0	0	1	4	64	850
Fundy Shore	5	37	0	0	2	16	52	984
TOTAL	102	819	11	756	17	82	657	12,911

Table A-10
Increase/Decrease in Fixed-Roof Accommodation Rooms
by Region, 1991

	Hotel		Motel		Small Inns		B & B	
	(+)	(-)	(+)	(-)	(+)	(-)	(+)	(-)
Annapolis Valley	1	10	2	27	5	2	15	31
South Shore	3	0	5	3	7	4	43	18
Hfx. - Dart.	256	52	2	1	0	6	3	3
Eastern Shore	0	0	0	0	0	0	6	0
Cape Breton	0	7	17	64	5	0	22	4
Northumberland	0	0	0	2	0	0	30	5
Fundy Shore	0	0	0	0	0	0	0	9
TOTAL	260	69	26	97	17	12	119	70

	Cottages		Resorts		H&F Lodges		Total	
	(+)	(-)	(+)	(-)	(+)	(-)	(+)	(-)
Annapolis Valley	2	2	0	0	3	0	28	72
South Shore	0	5	0	4	0	0	58	34
Hfx. - Dart.	6	0	0	0	0	0	267	62
Eastern Shore	0	0	0	0	0	0	6	0
Cape Breton	21	3	40	0	0	0	108	78
Northumberland	11	3	0	0	0	0	41	10
Fundy Shore	1	5	0	0	0	0	1	14
TOTAL	41	18	40	4	3	0	506	270

Fixed-Roof Accommodation Supply by County

Table A-11
Fixed-Roof Accommodation Rooms for Sale
by County, 1991

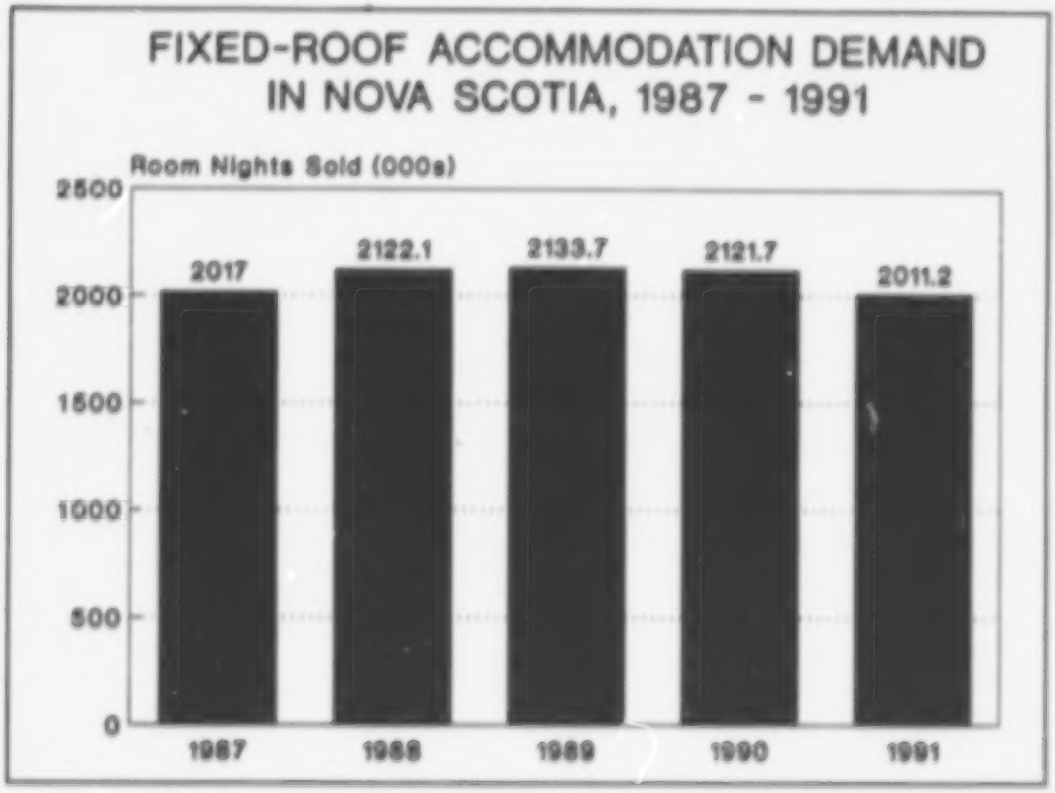
	Hotel		Motel		Small Inns		B & B	
	Props.	Rms.	Props.	Rms.	Props.	Rms.	Props.	Rms.
Annapolis	0	0	12	257	4	27	29	108
Antigonish	0	0	9	270	0	0	7	25
Cape Breton	7	542	14	573	0	0	20	79
Cumberland	0	0	12	299	2	14	10	33
Colchester	1	90	13	501	0	0	16	52
Digby	1	10	9	157	4	37	17	65
Guysborough	1	10	2	20	0	0	4	14
Halifax	23	3,309	26	900	5	78	33	165
Hants	0	0	4	80	0	0	8	26
Inverness	1	11	27	593	2	13	8	33
Kings	1	106	8	273	4	49	11	43
Lunenburg	2	76	13	359	7	61	29	111
Pictou	1	30	8	287	2	30	15	56
Queens	0	0	4	61	1	10	8	31
Richmond	2	9	2	23	2	21	1	3
Shelburne	1	18	5	106	1	3	12	38
Victoria	4	103	11	277	1	11	15	57
Yarmouth	2	146	14	431	1	6	8	28
TOTAL	47	4,460	193	5,467	36	360	251	967

	Cottages		Resorts		H&F Lodges		Total	
	Props.	Rms.	Props.	Rms.	Props.	Rms.	Props.	Rms.
Annapolis	9	89	0	0	2	11	56	492
Antigonish	4	17	0	0	0	0	20	312
Cape Breton	5	42	0	0	1	3	47	1,239
Cumberland	3	21	0	0	0	0	26	367
Colchester	5	28	0	0	2	16	37	687
Digby	4	33	2	227	1	3	38	532
Guysborough	2	11	2	86	2	6	13	147
Halifax	11	78	0	0	1	3	99	4,533
Hants	1	4	0	0	0	0	13	110
Inverness	22	188	0	0	1	7	61	845
Kings	1	30	0	0	2	8	27	509
Lunenburg	4	35	1	4	0	0	56	646
Pictou	5	58	0	0	1	4	32	465
Queens	4	25	1	92	3	13	21	232
Richmond	6	41	2	55	1	8	16	160
Shelburne	1	4	0	0	0	0	19	169
Victoria	13	109	3	292	0	0	47	849
Yarmouth	3	16	0	0	0	0	28	627
TOTAL	102	819	11	756	17	83	657	12,911

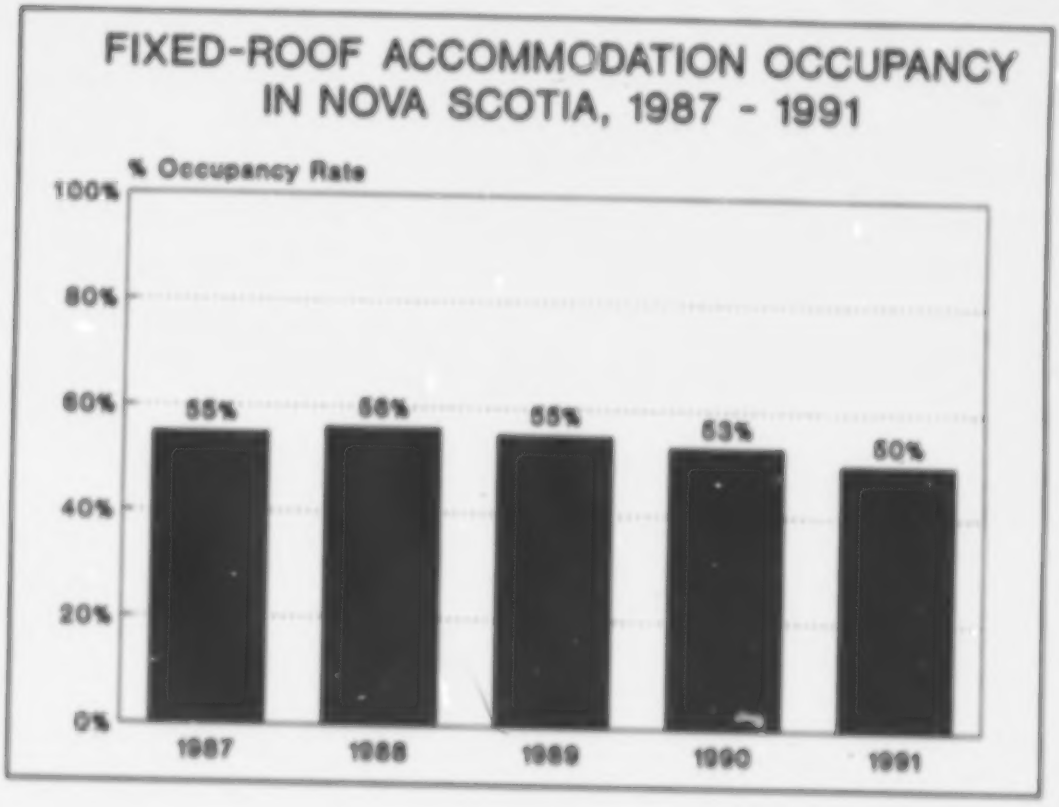
ACCOMMODATION DEMAND

Overview of Fixed-Roof Accommodation Demand

Overall, fixed-roof accommodation properties in Nova Scotia in 1991 sold a total of 2,011,200 room-nights. This represents a 5% decrease from the 1990 season, and the second decline in as many years.

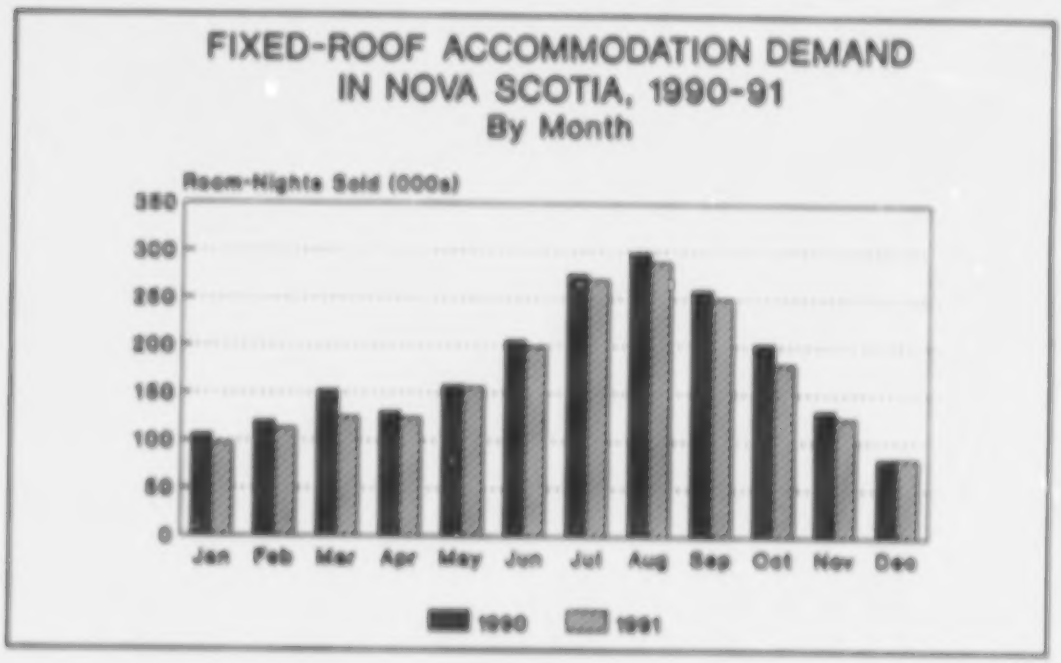


Falling demand, accompanied by a slight increase in the room supply resulted in an overall average occupancy rate of 50%, down 3 percentage points from 1990. This represents the third consecutive annual decline in the occupancy rate, from a peak of 56% in 1988.



Seasonal Patterns in Demand

Compared to 1990 on a monthly basis, room-nights sold declined in every month except December. In particular, March brought an 18% decline from the previous year, although this, in part, reflected an exceptional month in 1990, when the Halifax-Dartmouth region hosted the World Figure Skating Championships. January (-9%) and October (-11%) were also particularly soft months for the fixed-roof accommodation sector. Only in December did the sector post a 1% gain over the previous year.



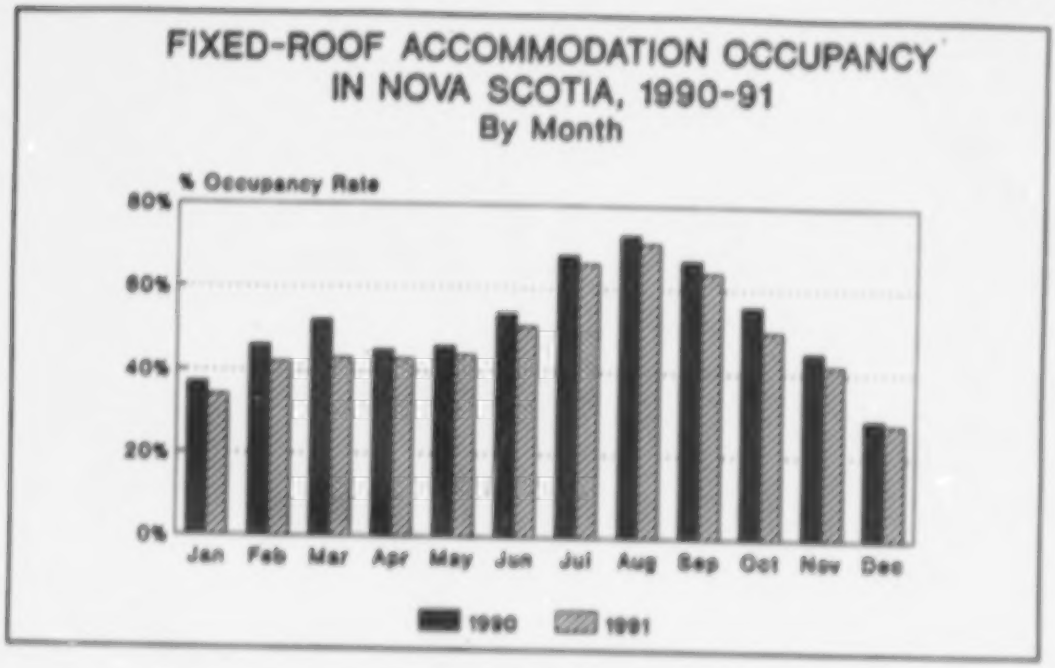


Table A-12
Fixed-Roof Accommodation Room-Nights Sold and Occupancy Rates by Month, 1990-91

	Room Nights Sold (000's)			Occupancy Rate		
	1990	1991	Change	1990	1991	% Point Change
January	106.3	97.0	-9%	37%	34%	-3%
February	119.7	112.4	-6%	43%	42%	-1%
March	152.6	125.0	-18%	52%	43%	-10%
April	130.2	123.8	-5%	45%	43%	-2%
May	157.6	155.9	-1%	46%	44%	-2%
June	205.5	198.7	-3%	54%	51%	-3%
July	278.4	270.5	-2%	68%	66%	-2%
August	298.3	288.8	-3%	73%	71%	-2%
September	258.9	251.0	-3%	67%	64%	-3%
October	202.6	181.3	-11%	55%	50%	-6%
November	133.5	124.6	-6%	45%	42%	-3%
December	82.3	82.7	1%	29%	28%	-1%
TOTAL	2,121.7	2,011.2	-5%	53%	50%	-3%

Demand by Type of Fixed-Roof Accommodation

The decline in demand for fixed-roof accommodation experienced in 1991 was shared by all property classifications except for small inns and resorts.

Small inns, enjoyed a 17% increase in room-nights sold. Even with the substantial growth rate, supply of rooms available in small inns more than kept pace with demand and resulted in a 1 percentage point decrease in occupancy rates.

Resorts experienced an increase in demand, posting a 9% gain over 1990. Again, however, supply increased faster than demand, with two new properties opening in 1991. The result was a decrease in the overall resort occupancy rate of 11 percentage points.

Hotels, which account about one half of the room-nights sold in Nova Scotia in 1991, fared better than average, incurring a 3% drop in room sales from 1990. Hotel occupancy rates also declined by 3 percentage points.

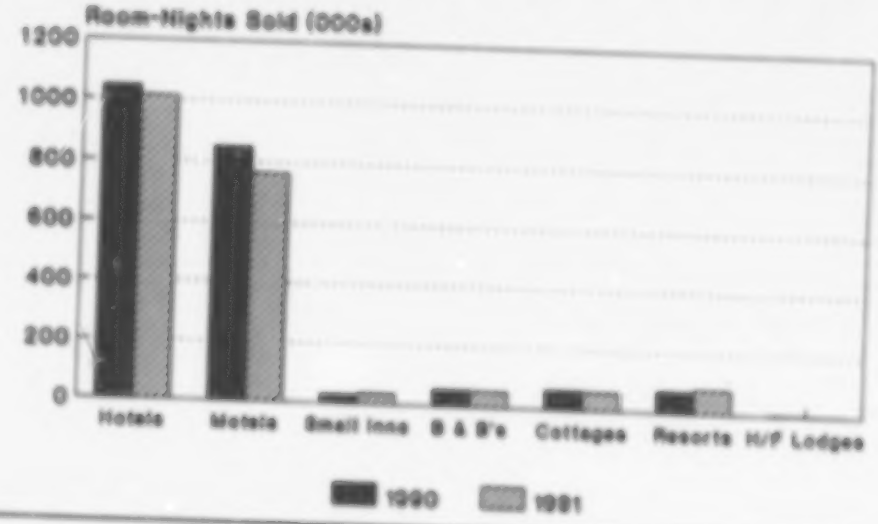
A decline in demand for motel rooms of some 10% had the biggest impact on the overall fixed-roof accommodation sector. Motels accounted for 23% of total provincial room sales in 1991. The decline in demand was accompanied by a 4 percentage point drop in motel occupancy rates.

Bed and breakfasts encountered a drop of 6% in room-nights sold during 1991, along with a drop of 2 percentage points in occupancy rates. Bed and breakfasts accounted for about 3% of total provincial room-nights sold in 1991.

Room sales for cottages and cabins as a group did not decline as much as some other property classifications. However, while room-nights sold in 1991 fell 3%, an increase in supply forced the average occupancy rate down 20 percentage points for this classification. About 3% of the total supply of rooms in Nova Scotia were classified as cottages and cabins, during 1991.

Hunting and fishing lodges had a 34% drop in demand but a substantial decrease in supply resulted in a fall in occupancy rates of 9%.

FIXED-ROOF ACCOMMODATION DEMAND IN NOVA SCOTIA, 1990-91
By Type



FIXED-ROOF ACCOMMODATION OCCUPANCY IN NOVA SCOTIA, 1990-91
By Type

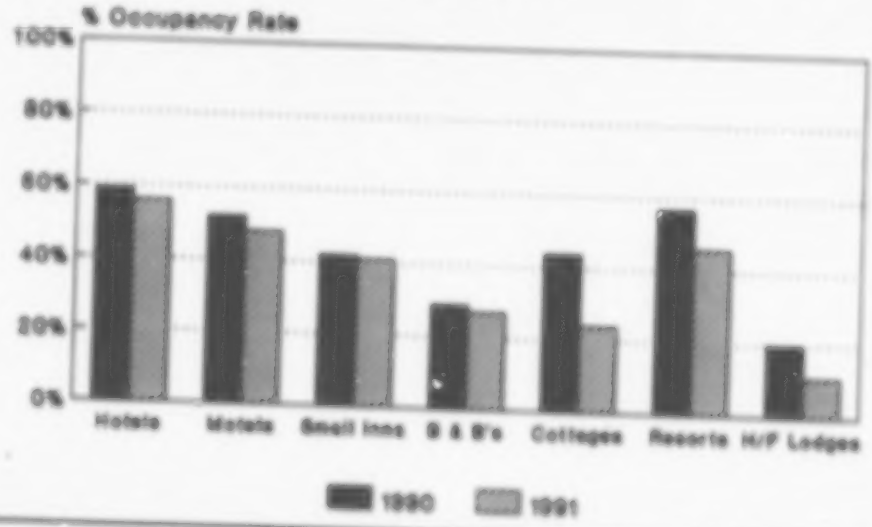


Table A-13
Fixed-Roof Accommodation Room-Nights Sold and Occupancy Rates by Type, 1990-91

	Room Nights Sold (000's)			Occupancy Rate		
	1990	1991	Change	1990	1991	% Point Change
Hotel	1,046.0	1,014.3	-3%	59%	56%	-3%
Motel	849.9	766.2	-10%	52%	48%	-4%
Small Inn	30.2	35.2	17%	42%	41%	-1%
B & B	55.7	52.2	-6%	29%	27%	-2%
Cottage/Cabin	63.7	61.5	-3%	44%	24%	-20%
Resorts	73.1	79.7	9%	57%	46%	-11%
H/F Lodges	3.1	2.1	-34%	20%	11%	-9%
TOTAL	2,121.7	2,011.2	-5%	53%	50%	-3%

Fixed-Roof Accommodation Demand by Region

The general decline in demand for fixed-roof accommodation in 1991 was shared by all regions of the province. In the Halifax-Dartmouth region, which accounted for 47% of rooms sold province-wide, demand fell by 4% from 1990. The Halifax-Dartmouth occupancy rate also dropped by 4 percentage points but remained the highest in the province at 58%.

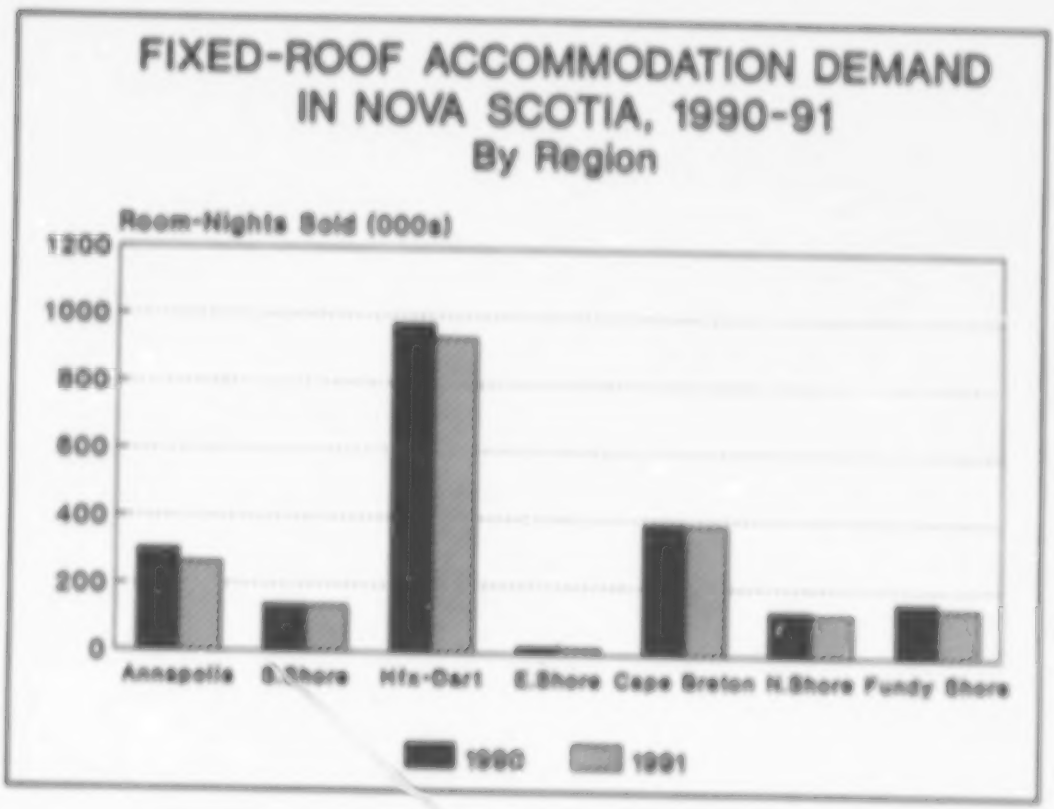
Cape Breton fared better than most other regions of the province, experiencing a decline of 1% in room-nights sold compared to the overall provincial decline of 5%. Occupancy rates in the Cape Breton region remained at 46%. Cape Breton accounted for 19% of total provincial room sales in 1991.

The South Shore region also had a better year than most regions, with a 1% decrease in room-nights sold. Room sales in this region equalled 7% of the provincial total. The occupancy rate declined one percentage point from 1990, ending 1991 with an average rate of 41%.

In terms of room-nights sold, the Eastern Shore region remains the lowest in the province, accounting for about 1% of total provincial room sales. Eastern Shore properties collectively reported a 3% drop in room-nights sold in 1991, however, the region posted a 1 percentage point increase in its occupancy rate, which ended the year at 38%.

About 7% of total provincial room-night sales occurred in the Fundy Shore Region during 1991. Demand fell by 11% in this region, while occupancy rates fell to 44% from 49% in 1990.

For the fixed-roof accommodation sector, properties in the Annapolis Valley experienced a 13% decrease in the number of room- nights sold. The occupancy rate dropped by 6% from 1990, winding up with a 42% average for 1991. The Annapolis Valley reported 13% of overall provincial room-nights sold in 1991.



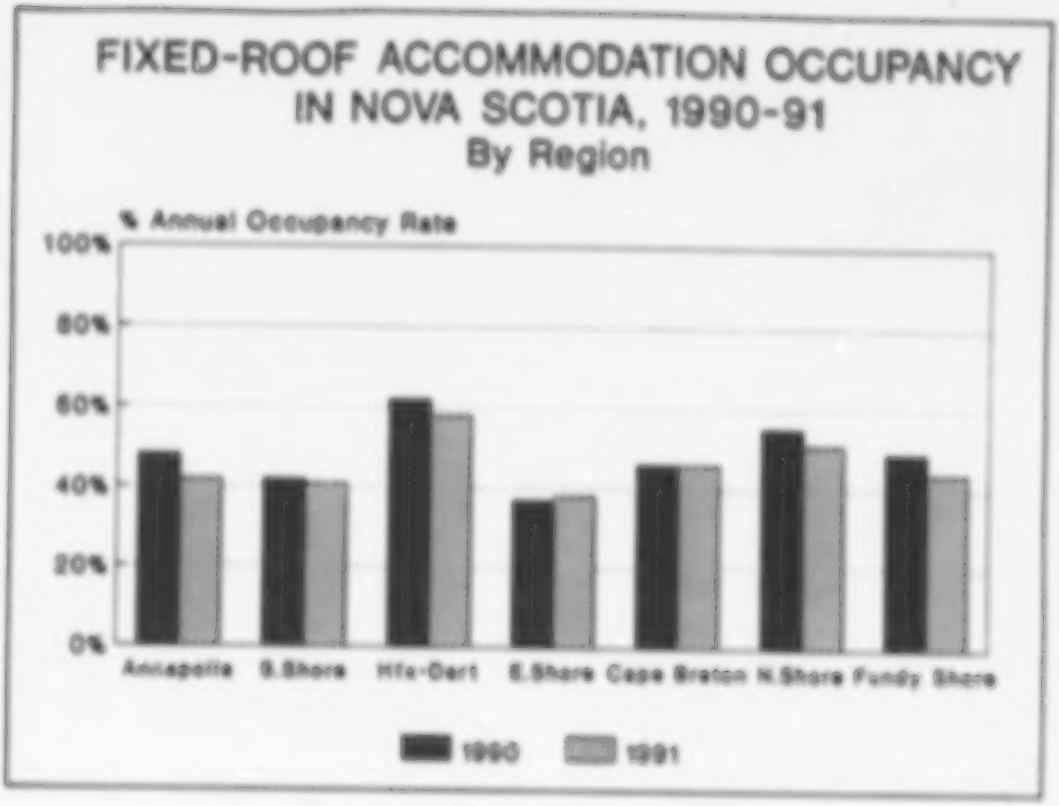


Table A-14
Fixed-Roof Accommodation Room-Nights Sold and Occupancy Rates
by Region, 1990-91

	Room Nights Sold (000's)			Occupancy Rate		
	1990	1991	Change	1990	1991	% Point Change
Annapolis	304.3	263.4	-13%	48%	42%	-6%
S. Shore	139.9	137.6	-1%	42%	41%	-1%
Hfx-Dart	978.8	935.5	-4%	62%	58%	-4%
E. Shore	19.8	19.3	-3%	37%	38%	1%
C. Breton	388.7	384.8	-1%	46%	46%	0%
N. Shore	132.5	126.6	-4%	55%	51%	-4%
Fundy Shore	161.4	143.9	-11%	49%	44%	-5%
TOTAL	2,121.7	2,011.2	-5%	53%	50%	-3%

APPENDIX A:

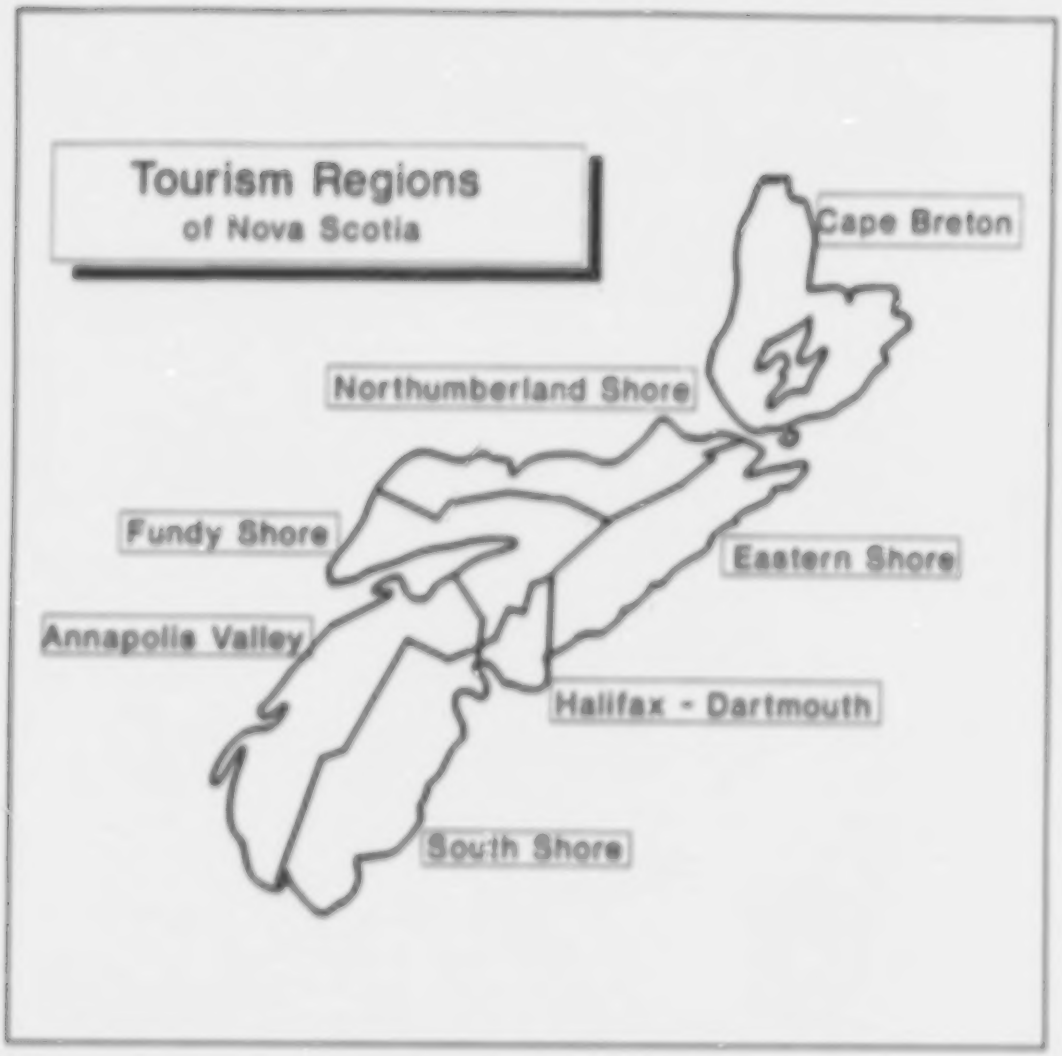
FIXED-ROOF ACCOMMODATION DEFINITIONS & TERMS

Definitions & Terms

Bed And Breakfast	Includes accommodation at farm and country vacation homes of three or more rooms. Breakfast must be included in the price of the room.
Cottages	Includes cabins. Separate living units.
Hotel	Inside access to rooms.
Hunting/Fishing Lodges	Three or more rooms. Have licensed guides and equipment available. All meals in package price.
Motel	Includes motor hotels. External access to rooms, although there may also be internal access in some cases.
Occupancy Rate	Room-nights sold as a percentage of the total available room-nights.
Resorts	Extensive recreation facilities on premises. Full service dining room. All private baths.
Room-Night	The equivalent of one room occupied for one night.
Small Inn	More than three rooms. Breakfast is not included in the price of the room.

APPENDIX B:

TOURISM REGIONS OF NOVA SCOTIA


Tourism Regions
of Nova Scotia
Cape Breton
Northumberland Shore
Fundy Shore
Eastern Shore
Annapolis Valley
Halifax - Dartmouth
South Shore

Description of Tourism Regions of Nova Scotia

Annapolis Valley	Includes portion of Yarmouth County north of line between Yarmouth Ferry Terminal and junction of Yarmouth, Digby, Shelburne and Queens County lines; all of Annapolis and Kings Counties, and portion of Hants County roughly west of the Avon River.
South Shore	Includes portion of Yarmouth County southeast of line Between Yarmouth ferry terminal and junction of Yarmouth, Shelburne, Digby and Queens County lines; all of Queens and Lunenburg Counties; and portion of Halifax County roughly described as area west of Pockwock Lake, south of Route 103 and west of route 306.
Halifax-Dartmouth	Includes Cities of Halifax and Dartmouth and (roughly) those areas contained by routes 253, 306, and 349 in the south: area bounded by Route 103 in the west, the Hants County and Colchester County lines in the north and the line between the mouth of Cole Harbour and Gays River in the east.
Eastern Shore	Includes portion of Halifax County east of line between mouth of Cole Harbour running northeast to Gays River, and all of Guysborough County.
Cape Breton	Includes all of Cape Breton Island.
Northumberland Shore	Includes portion of Cumberland and Colchester Counties north of the Trans Canada Highway to Wentworth, then area north of line between Wentworth and Mount Thom, all of Pictou and Antigonish Counties.
Fundy Shore	Includes portion of Cumberland and Colchester Counties south of Trans Canada Highway to Wentworth, remainder of Colchester County southwest of line between Wentworth and Mount Thom and portion of Hants County east of the Avon River.

1991 NOVA SCOTIA CAMPGROUND REPORT

Research Section

Nova Scotia Department

of Tourism and Culture

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FORWARD

The Department of Tourism and Culture has been collecting campground statistics since 1973. This information facilitates the effective monitoring and development of the campground industry in Nova Scotia.

The *Campground Report* provides information on trends and the relative importance of geographic markets, tenters and recreational vehicles as well as short-term and seasonal campers.

The *1991 Campground Report* consists of two main sections. The first, "Campground Supply", presents information of the number, size and type of campground facilities in Nova Scotia as well as their distribution across the province. This information has been prepared by the Training and Inspection Services Section, the licensing authority for private and municipal campgrounds in Nova Scotia.

The second section of this report, "Campground Demand", presents a summary of campground activity, in terms of site-nights sold, registrations and occupancy rates. This information is generated by monthly occupancy returns forwarded by operators to the Research Section. The Department gratefully acknowledges the co-operation of municipal and private campground operators in supplying this invaluable information.

This *Campground Report* pertains to all licensed private and municipal campgrounds in Nova Scotia. It does not include provincial or federal campgrounds.

This report uses a number of terms with specific meanings within the industry. For an explanation, please consult the Glossary of Terms contained in the Appendix (page 17).

The *Campground Report* is one of four reports which collectively form the *Tourism Statistical Review*. Other documents which comprise the *Tourism Statistical Review* and which are also available under seperate cover include the *Economic Impact Report*, the *Visitor Volume Report*, and the *Fixed-Roof Accommodation Report*.

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CAMPGROUND SUPPLY

Overview of Campground Supply

In 1991, there were 129 municipal and private campgrounds operating in Nova Scotia - two less than in the previous year. At the same time, the number of available campsites declined 2%, from 10,404 in 1990 to 10,186 in 1991.

Three quarters of all campsites offered in 1991 were serviced. On average, campgrounds had 79 sites.

While the number of available campsites grew in 1987 and 1988, in each of the following three years (1989 to 1991) the number of campsites dropped by between 1% and 2% annually. Over the 1987 - 1991 period, the number of available sites declined a total of 1%.

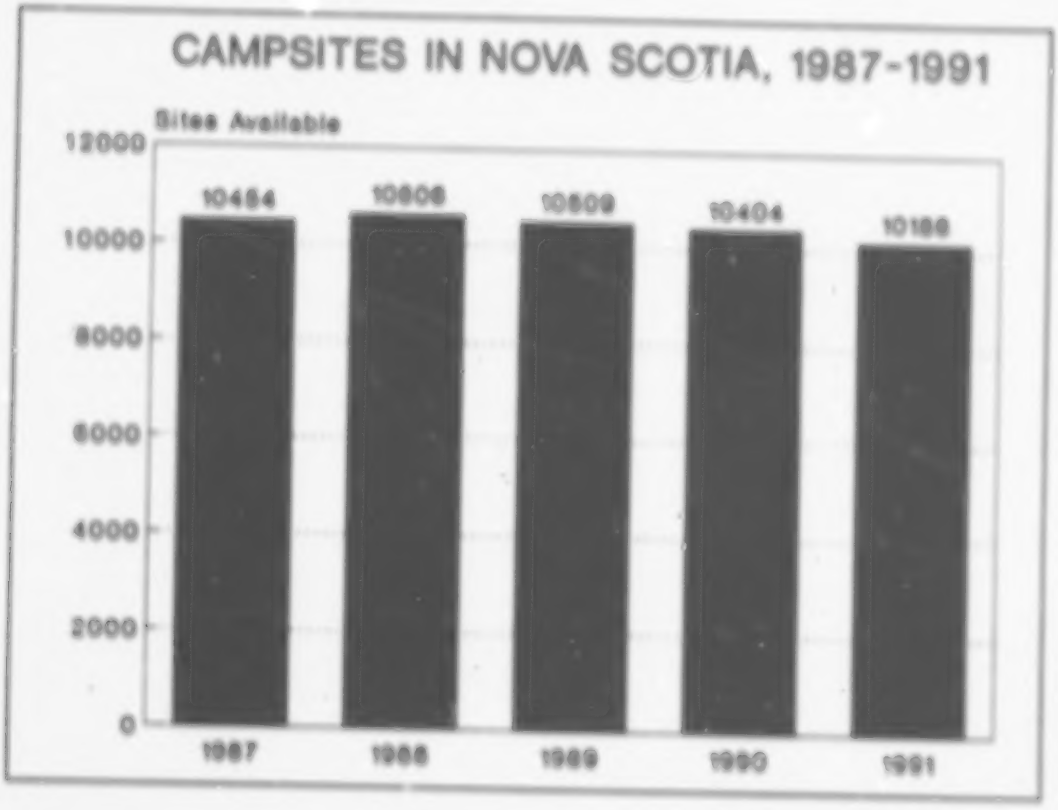


Table C-1
Summary of Campground Supply, 1988-91

	1988	1989	1990	1991
Number of Campgrounds	133	131	131	129
Number of Sites for Sale	10,606	10,509	10,404	10,186
Number of Serviced Sites	7,727	7,682	7,753	7,666
Number of Unserviced Sites	2,879	2,827	2,651	2,520

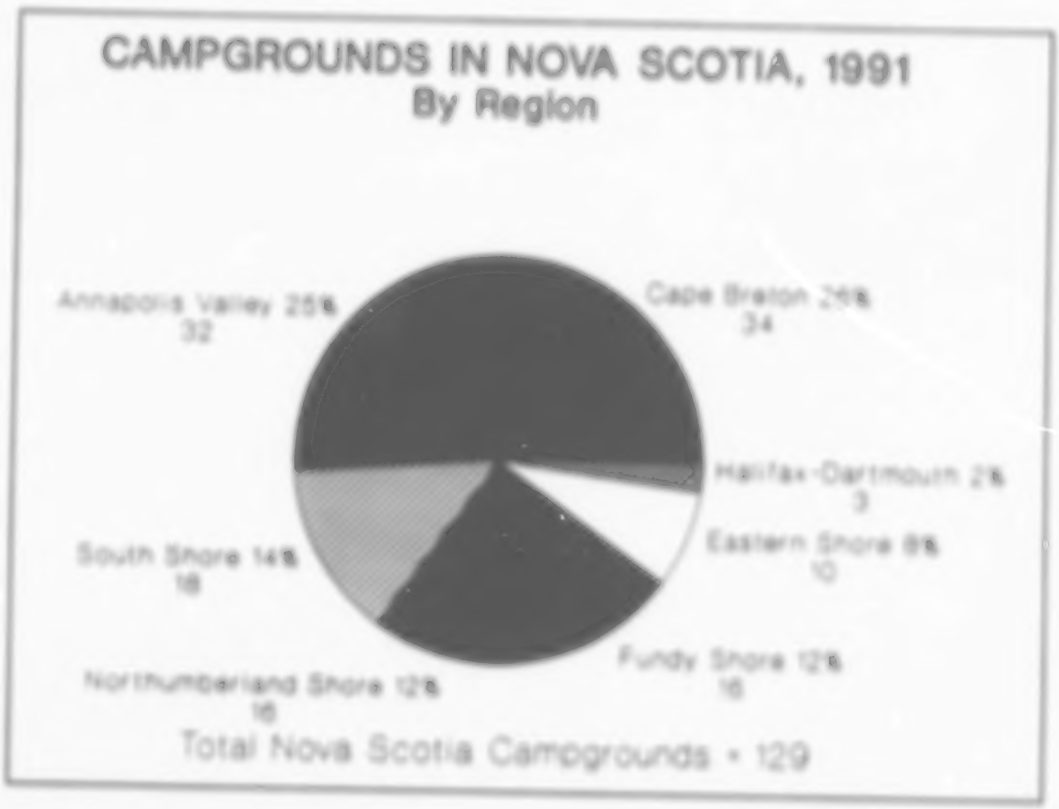
Table C-2
Facilities Offered in Campgrounds, 1988-91

		Number of Campgrounds Offering Facility			
		1988	1989	1990	1991
Swimming:	Outdoor Pool	95	92	95	93
	Lake	45	49	47	47
	Beach	54	66	64	74
Water Activities:					
	Fishing	81	87	81	89
	Boating	47	60	28	36
Recreational Activities:					
	Recreational Hall	93	93	95	97
	Games	93	96	97	111
	Movies	11	13	14	13
Food:	Restaurant	9	11	10	11
	Camp Store	84	79	83	86
	Canteen	69	66	36	38
Washroom Facilities:					
	Flush Toilets	116	119	119	129
	Pit Toilets	43	41	29	49
	Pay Showers	63	54	64	69
	Free Showers	58	59	60	45
	Disposal Stations	99	107	106	125
Other:	Laundromat	86	87	88	90
	Firewood	110	116	107	140
	Propane	18	20	19	20
	Pay Telephone	63	94	99	101
	Television Hook-up	1	1	3	3

Campground Supply by Region

Generally, campgrounds are distributed throughout the rural areas of the province. In 1991, the Annapolis Valley region offered 30% of Nova Scotia's campsites; Cape Breton 24%; Fundy Shore 15%; South Shore 14%; Northumberland Shore 11%; and Eastern Shore 4%. In contrast, the Halifax-Dartmouth region accounted for only 3% of the sites available in private and municipal campgrounds.

Eastern and Fundy Shore regions experienced the largest increases from 1990 in available campsites, rising 7% and 5% respectively. A 3% increase in campsites available occurred in both the Annapolis Valley and Cape Breton regions. The South Shore and Halifax-Dartmouth regions encountered 5% and 8% declines in available campsites respectively, while the Northumberland Shore region encountered a 27% drop.



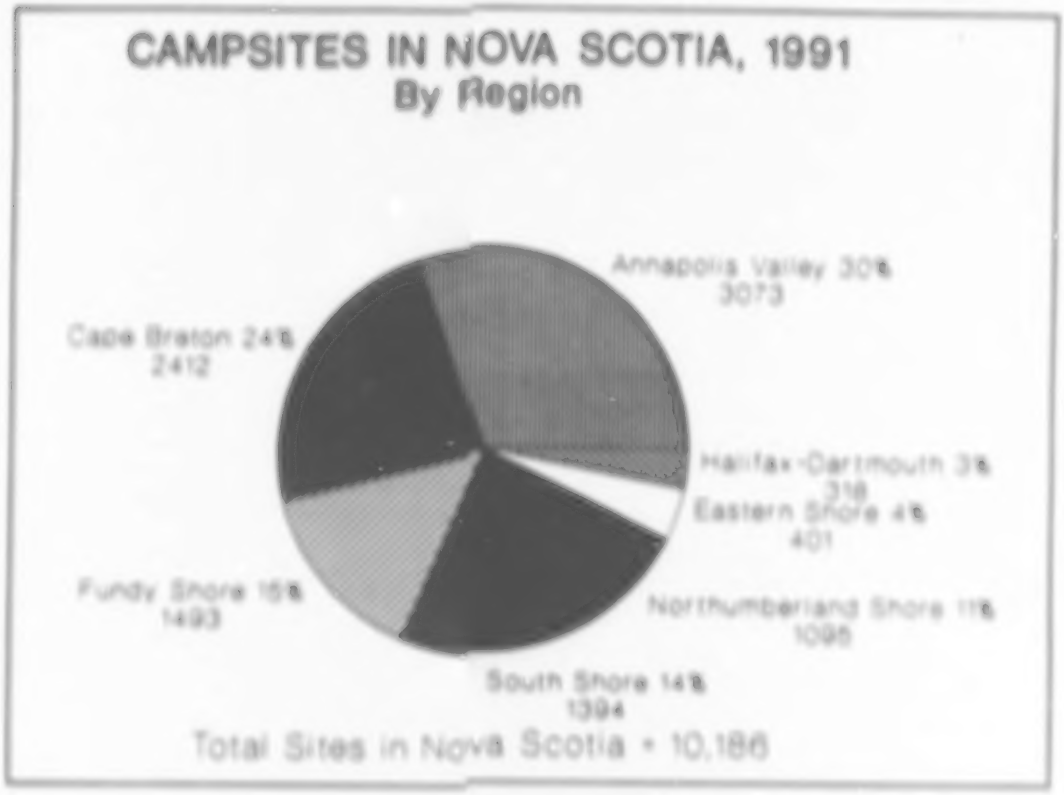


Table C-3
Campgrounds and Sites
by Region, 1990-91

	Annapolis Valley	South Shore	Halifax Dart.	Eastern Shore	Cape Breton	North. Shore	Fundy Shore	Total
Campgrounds								
1990	30	19	4	9	33	20	16	131
1991	32	18	3	10	34	16	16	129
Net Change	+ 2	- 1	- 1	+ 1	+ 1	- 4	0	- 2
% Change	+ 7%	- 5%	-25%	+11%	+ 3%	-20%	0%	- 2%
Sites								
1990	2,975	1,432	366	375	2,350	1,501	1,427	10,406
1991	3,073	1,394	318	401	2,412	1,095	1,493	10,186
Net Change	+98	-38	-26	+26	+62	-406	+66	-210
% Change	+ 3%	- 5%	- 8%	+ 7%	+ 3%	- 27%	+ 5%	- 2%

Table C-4
Campgrounds and Sites
by Region, 1990-91

Tourism Region	Number of Campgrounds 1990	Number of Campgrounds 1991	Number of Serviced Sites 1990	Number of Serviced Sites 1991	Number of Unserviced Sites 1990	Number of Unserviced Sites 1991
Annapolis	30	32	2,621	2,524	554	549
South Shore	19	18	983	982	439	413
Ofe-Dart	6	3	233	218	111	100
Eastern Shore	9	10	274	289	101	112
Cape Breton	33	34	1,675	1,733	675	679
North. Shore	20	20	1,124	829	377	266
Fundy Shore	16	16	1,033	1,091	394	402
Total	131	129	7,753	7,666	2,651	2,520

Tourism Region	Total Number of Sites 1990	Total Number of Sites 1991	Avg. no. of Sites Per Campground 1990	Avg. no. of Sites Per Campground 1991
Annapolis	2,975	3,073	99	93
South Shore	1,432	1,396	75	75
Ofe-Dart	344	318	69	106
Eastern Shore	375	401	41	40
Cape Breton	2,350	2,412	71	70
North. Shore	1,501	1,095	75	60
Fundy Shore	1,427	1,493	89	93
Total	10,404	10,186	79	79

Campground Supply by County

Table C-5
Campgrounds and Sites
by County, 1990-91

Region	Number of Campgrounds		Number of Serviced Sites		Number of Unserviced Sites	
	1990	1991	1990	1991	1990	1991
Annapolis	5	8	267	304	122	91
Antigonish	6	6	285	285	80	80
Cape Breton	11	11	704	707	243	239
Colchester	10	9	636	615	212	205
Cumberland	8	7	322	209	134	113
Digby	6	5	331	253	91	84
Guysborough	6	6	145	145	51	51
Halifax	14	15	610	663	344	356
Hants	8	7	553	547	188	131
Inverness	12	12	482	527	264	264
Kings	11	12	1,343	1,350	251	251
Lunenburg	8	8	407	422	150	150
Pictou	8	8	514	429	130	97
Queens	3	3	293	293	67	67
Richmond	2	3	68	90	32	44
Shelburne	3	2	27	15	27	20
Victoria	8	8	420	420	116	116
Yarmouth	3	3	307	307	65	65
Total	131	129	7,753	7,666	2,681	2,523

Region	Total Number of Sites		Avg. # of Sites Per Campground	
	1990	1991	1990	1991
Annapolis	389	395	63	63
Antigonish	365	365	91	91
Cape Breton	947	942	90	86
Colchester	848	820	94	90
Cumberland	456	322	57	29
Digby	282	337	90	67
Guysborough	190	190	69	69
Halifax	954	1,019	68	67
Hants	741	678	92	86
Inverness	746	791	63	66
Kings	1,594	1,601	144	133
Lunenburg	557	572	69	71
Pictou	644	526	71	58
Queens	360	360	120	120
Richmond	101	182	50	54
Shelburne	54	35	24	11
Victoria	536	536	67	67
Yarmouth	372	372	124	124
Total	10,404	10,180	80	79

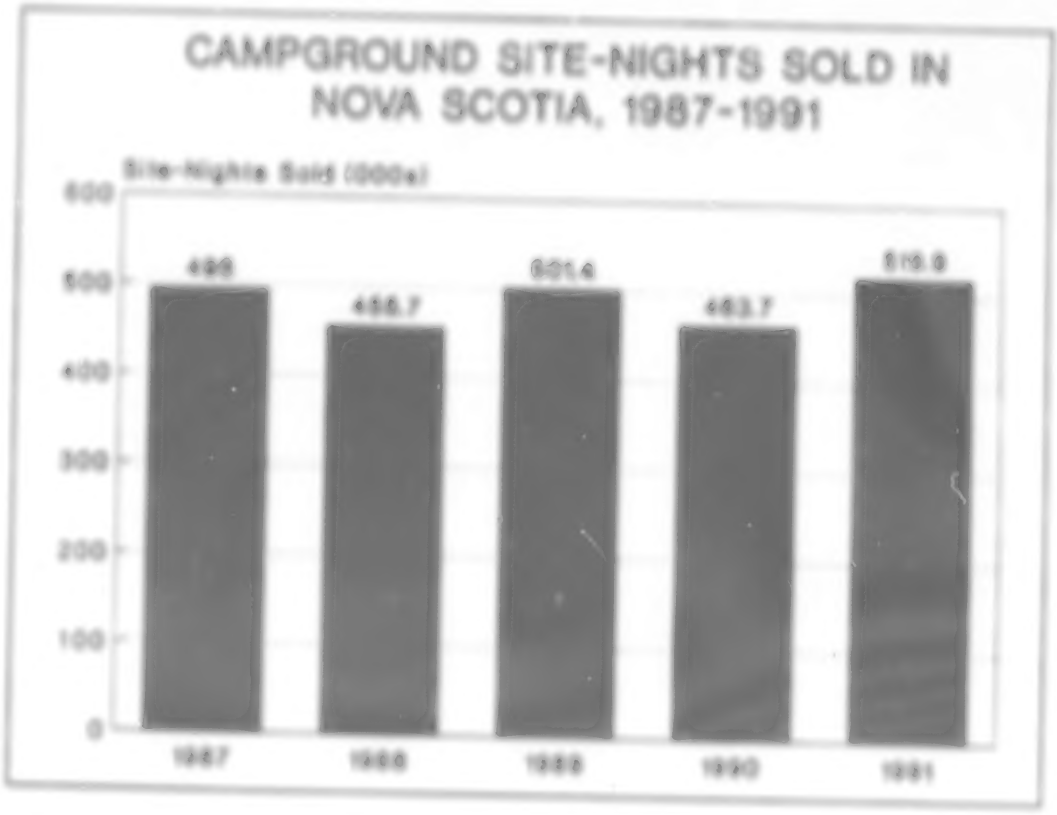
CAMPGROUND DEMAND

Overview of Campground Demand

Municipal and private campgrounds sold a total of 519,900 site-nights to short-term and seasonal campers during 1991. This represents an increase of 12% from the 1990 season. The increase in site-nights sold was accompanied by an increase in the campground occupancy rate which rose from 29% in 1990 to 35% in 1991.

The increase in site-nights sold during 1991 compared to 1990 was due entirely to an increase in the number of seasonal campers. If seasonal campers are excluded, the number of site-nights sold in 1991 would have been 5% below the 1990 sales level.

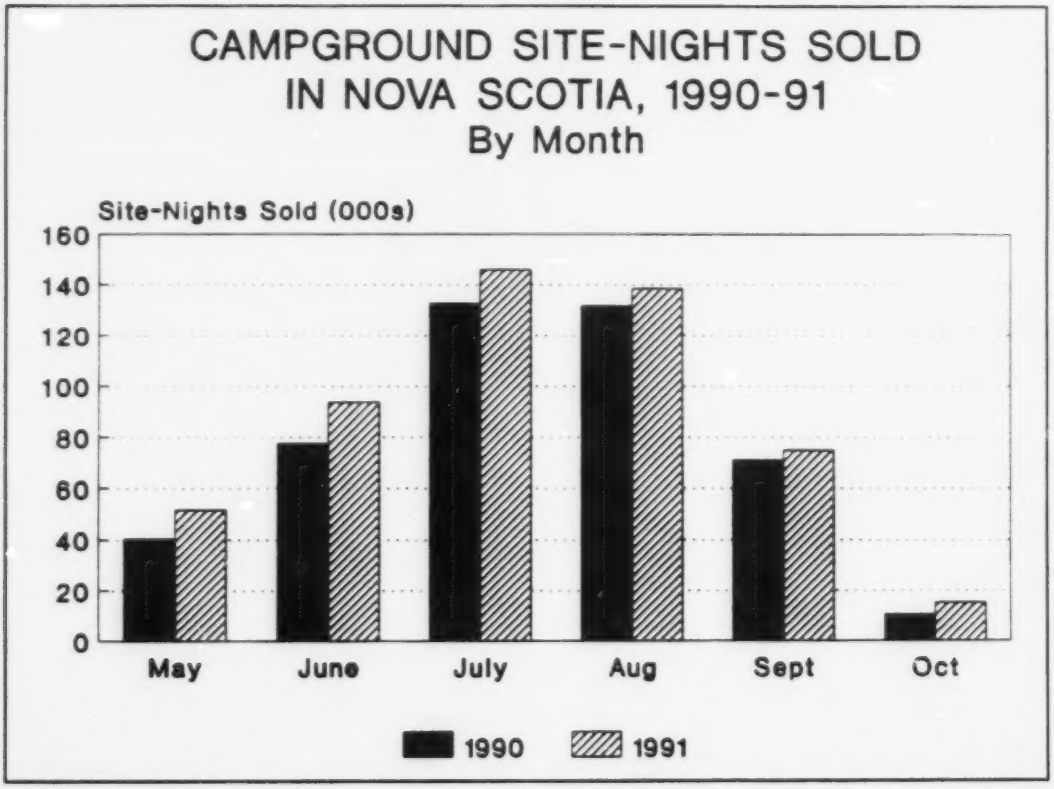
While the total number of annual site-nights sold has been erratic over the past five years, varying between 456,000 and 520,000, there has been a slight growth trend.



Seasonal Patterns in Demand

The seasonal pattern of camp-site sales seen in previous years is still visible, with increases over 1990 levels experienced in every month. However, above average increases in the shoulder season months of May, September and August, resulted in a slight flattening of the usual seasonal peak.

The largest monthly increase (+45%) was experienced in October, however this growth was based on a small base number (10,600 site-nights in 1990). May and June also posted above average growth at 28% and 21%, respectively. This growth resulted in sales of 51,600 site-nights in May and 93,600 in June.



In July, 145,900 site-nights were sold, representing a 10% increase over 1990 levels. At 138,600 site-nights sold, August posted a 5% gain over last year's levels. September (74,800 site-nights) also ended with site-nights sold 5% up from 1990 levels.

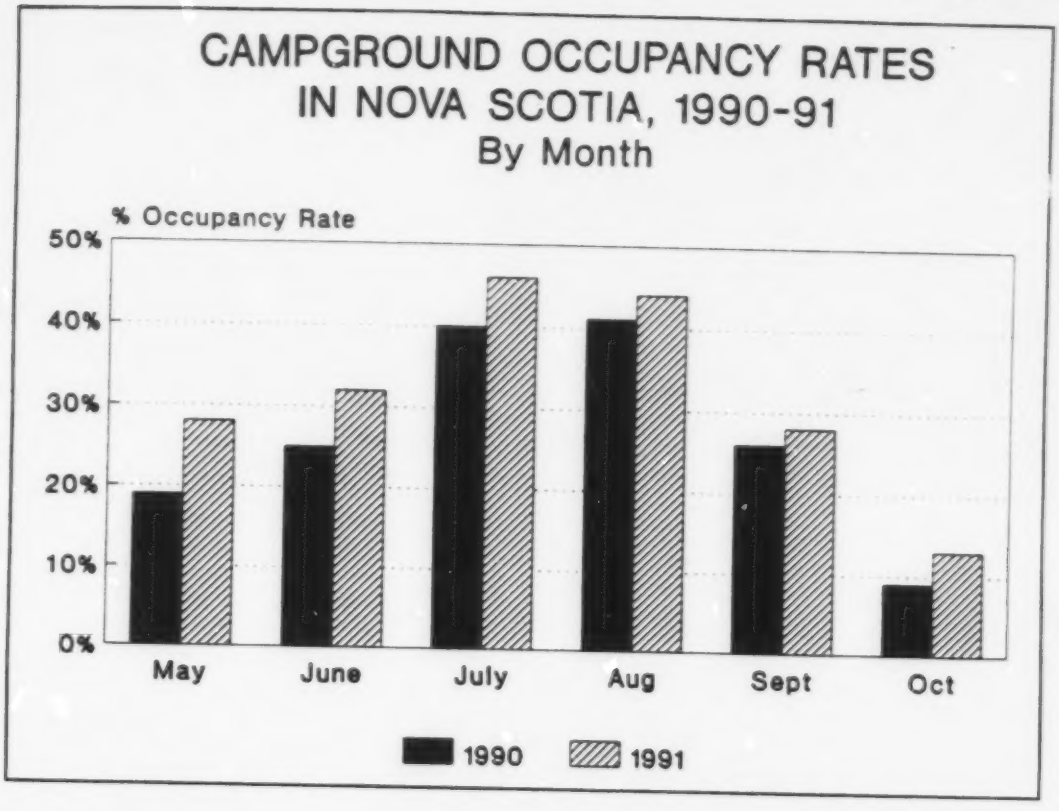


Table C-6
Campground Site-Nights Sold and Occupancy Rates
by Month, 1990-91

	Site-Nights Sold			Occupancy Rates		
	1990	1991	% Change	1990	1991	% Pt Change
May	40,300	51,600	+ 28%	19%	28%	+ 9%
June	77,600	93,600	+ 21%	25%	32%	+ 7%
July	132,500	145,900	+ 10%	40%	46%	+ 6%
Aug	131,700	138,600	+ 5%	41%	44%	+ 3%
Sept	71,000	74,800	+ 5%	26%	28%	+ 2%
Oct	10,600	15,300	+ 45%	9%	13%	+ 4%
TOTAL	463,700	519,900	+ 12%	29%	35%	+ 6%

* Due to rounding, data may not always add to totals.

Demand by Type of Camper

In 1991, as in previous years, seasonal campers accounted for two thirds of site-nights sold. This amounted to sales of 345,700 site-nights for private and municipal campgrounds to seasonal campers, a substantial increase of 23% from 1990.

Short-term campers accounted for the remaining one third of site-nights sold. Short-term site-nights were down 5% from 1990, falling from 182,700 to 174,200 in 1991.

The average short-term camper party size continued the decline experienced in 1990 and dropped slightly from 2.67 people per party in 1990 to 2.65 people per party in 1991.

Table C-7
Campground Site-Nights
by Visitor Type, 1991

	Site-Nights Sold			
	Short-Term Campers	Seasonal Campers	Total	Avg Short-Term Party Size
May	4,900	46,700	51,600	2.50
June	25,000	68,600	93,600	2.68
July	62,900	82,900	145,900	2.80
Aug	59,600	79,100	138,600	2.65
Sept	18,800	56,000	74,800	2.28
Oct	3,000	12,400	15,300	2.11
Total '91	174,200	345,700	519,900	2.65
% of Ttl	34%	67%	100%	
Total '90	182,700	281,000	463,700	2.67
% Change	- 5%	+ 23%	+ 12%	

* Due to rounding, data may not always add to totals.

Short-Term Camper Registrations By Visitor Origin

Approximately 115,400 short-term campers registered at Nova Scotia municipal or private campgrounds during 1991. About two thirds of these (77,860) represent registrations by recreational vehicles. Registrations by this group were 5% below 1990 levels. The remaining third of short-term registrations (37,410) were by campers with tents. The number of registrations for this group fell by 3%.

Recreational Vehicle Campers

Among those short-term campers with recreational vehicles, Nova Scotians accounted for four of every ten (37%) registrations. Americans comprised about 32% of short-term RV registrations. About a quarter of the RVs registered were from Canadian provinces or territories other than Nova Scotia. Four percent of short-term RV registrations were accounted for by residents of other countries.

As in 1990, the sharpest declines by region of origin were seen in American RV registrations (down 13%). The rate of decline in registrations from other Canadian provinces slowed from a 15% drop in 1990 to a 4% drop in 1991. Nova Scotian short-term RV registrations declined by a lesser 2%. Other country short-term RV registrations grew by 77%, albeit on a small base number.

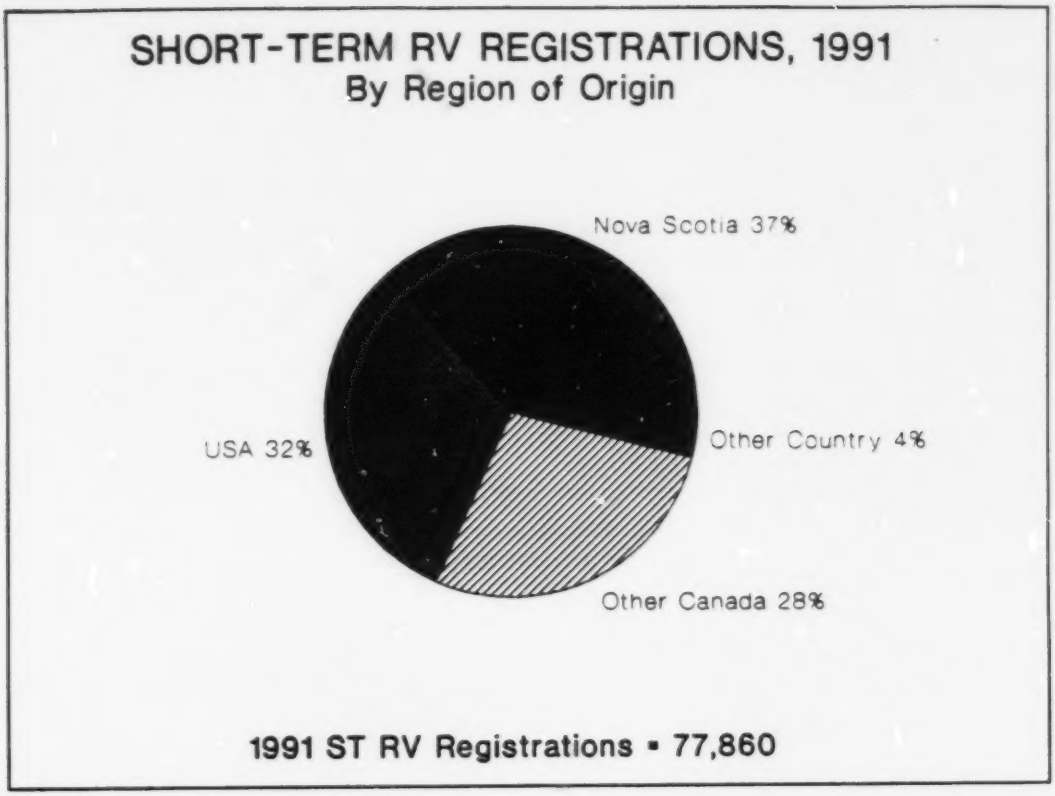


Table C-9
Short-Term RV Registrations
by Visitor Origin, 1991

	Nova Scotia	Other Canada	USA	Other Country	TOTAL
May	1,780	440	380	150	2,750
June	5,320	2,270	2,640	340	10,570
July	8,710	8,860	7,320	570	25,460
Aug	10,050	7,040	6,650	1,250	24,980
Sept	2,290	2,490	6,380	590	11,750
Oct	630	420	1,190	120	2,360
Total '91	28,780	21,530	24,560	3,010	77,860
% of Ttl	37%	28%	32%	4%	100%
Total '90	29,200	22,500	28,300	1,700	81,700
% Change	- 2%	- 4%	-13%	+77%	- 5%

* Due to rounding, data may not always add to totals.

Tent Campers

Almost half (46%) of all short-term tent registrations in 1991, were by Nova Scotian residents. Tenters from other areas in Canada accounted for another third (31%), while Americans tenters made up 20%. Tenters from other countries accounted for 1,210 or 3% of the short-term tent registrations.

Nova Scotia short-term tent registrations slowed their rate of decline from 1990, but still decreased 1% from 1990 levels, while registrations from other Canadian provinces remained unchanged from the previous year. Short-term tent registrations by Americans continued their decline from 1990 and dropped another 10% during 1991. In contrast to their strong growth in 1990, other country registrations grew slightly during 1991.

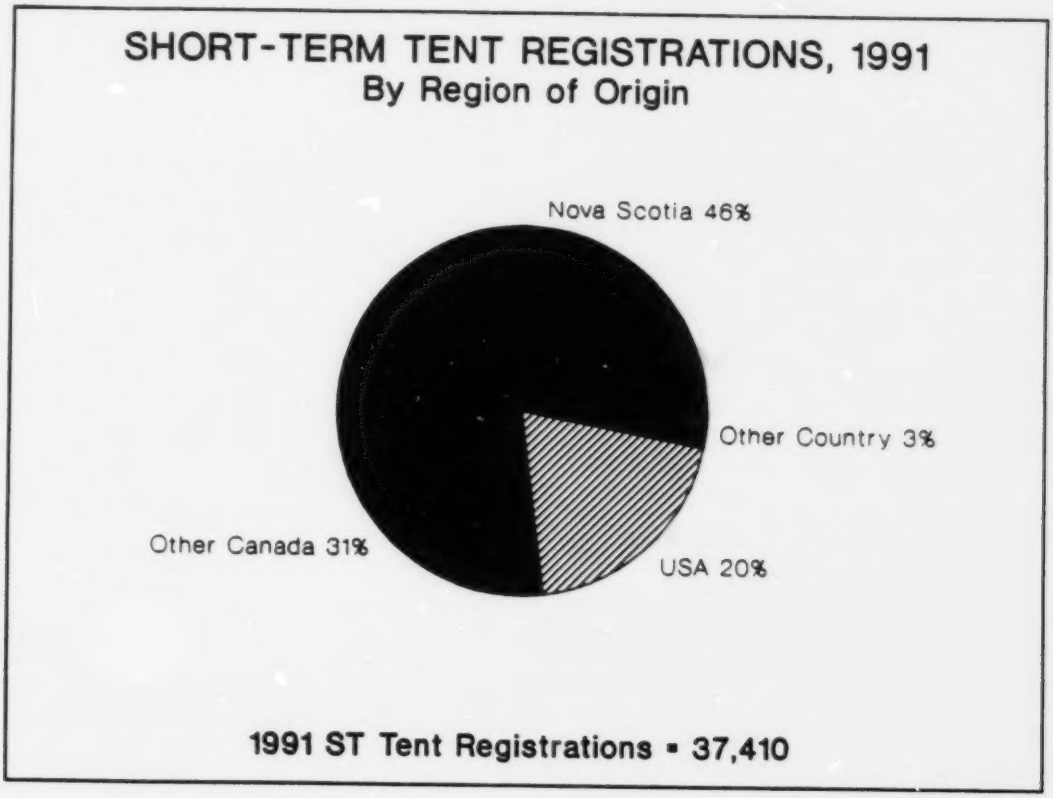


Table C-8
Short-Term Tent Registrations
by Visitor Origin, 1990-91

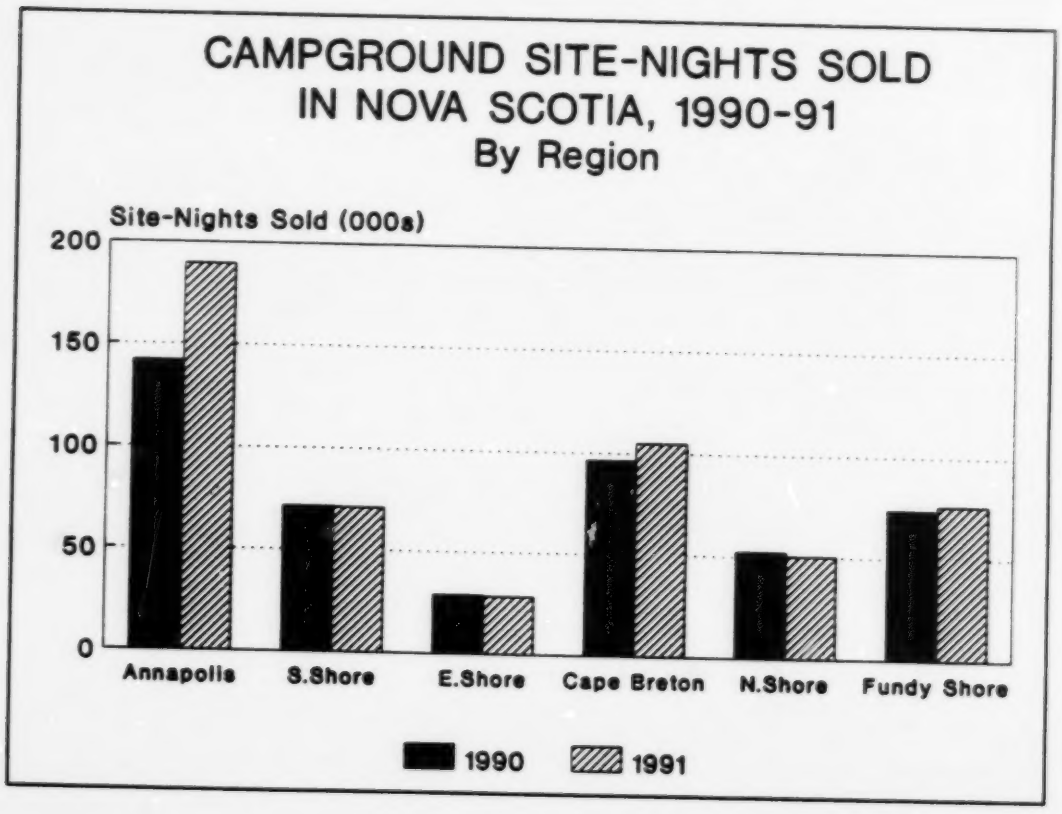
	Nova Scotia	Other Canada	USA	Other Country	TOTAL
May	550	120	90	50	800
June	3,620	1,070	970	180	5,850
July	6,180	5,620	2,910	440	15,150
Aug	6,460	4,290	2,700	380	13,820
Sept	480	470	660	160	1,770
Oct	20	20	60	10	110
Total '91	17,310	11,590	7,390	1,210	37,500
% of Ttl	46%	31%	20%	3%	100%
Total '90	17,400	11,600	8,200	1,200	38,400
% Change	- 1%	0%	-10%	+ 1%	- 3%

* Due to rounding, data may not always add to totals.

Campground Demand by Region

Although site-nights sold in Nova Scotia rose 12% in 1991, campground industry performance varied significantly between tourism regions. The Annapolis Valley region experienced the largest increase, a substantial 34% rise in site-nights sold in 1991, while Cape Breton site-night sales grew 9% and Fundy Shore increased 3%. The South Shore experienced only a slight decline (less than half of one percent) in site-nights sold during 1991, compared to the previous year, although its occupancy rate was up 1% point.

The Eastern and Northumberland Shore regions were the only two regions to experience declines (2% and 4% respectively) in the number of site-nights sold in 1991 compared to 1990. However, the Northumberland Shore did experience a 7% point increase in its occupancy rate in 1991, due in part to the 27% decrease in available campsites in the region.



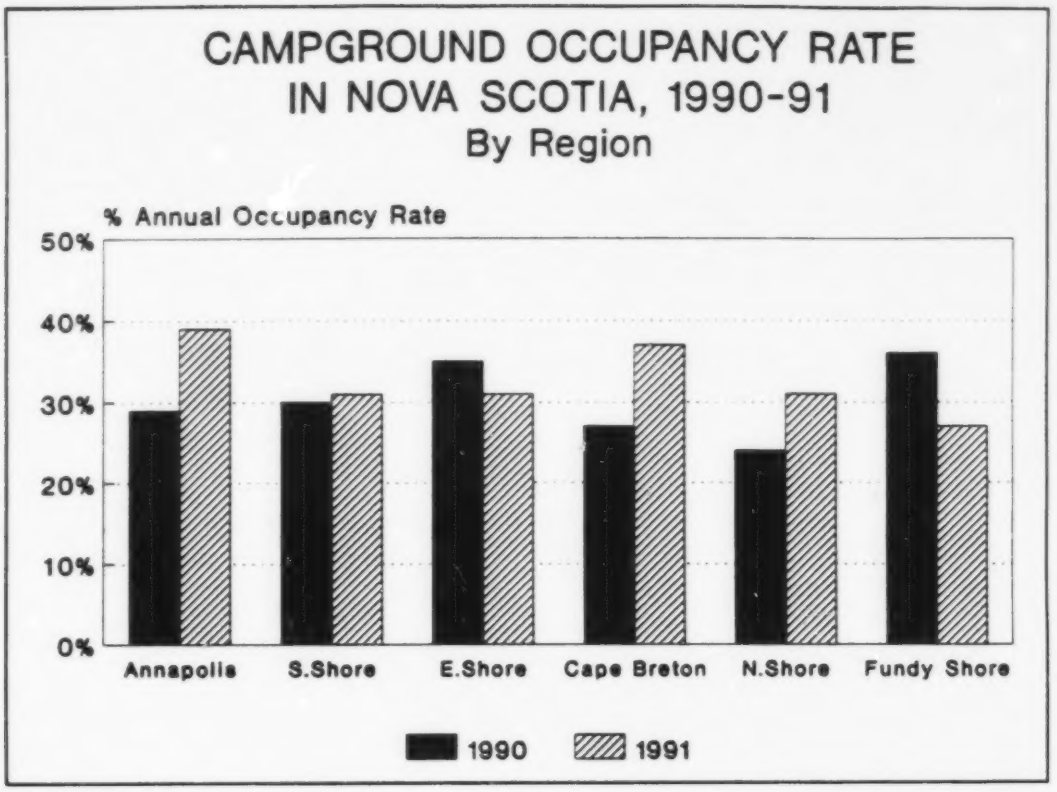


Table C-10
Campground Site-Nights Sold and Occupancy Rates
by Region, 1990-91

	Site-Nights Sold			Occupancy Rates		
	1990	1991	% Change	1990	1991	% Pt Change
Annapolis	141,800	189,600	+34%	29%	39%	+10%
South Shore	71,300	71,000	0%	30%	31%	+ 1%
Hfx-Dart	NA	NA	NA	NA	NA	NA
Eastern Shore	28,900	28,400	- 2%	35%	31%	- 4%
Cape Breton	96,000	104,800	+ 9%	27%	37%	+10%
North. Shore	52,300	50,300	- 4%	24%	31%	+ 7%
Fundy Shore	73,300	75,800	+ 3%	36%	27%	- 8%
Total	463,700	519,900	+12%	29%	35%	+ 6%

* Due to rounding, data may not always add to totals.

To protect the confidentiality of the three Halifax-Dartmouth region campgrounds and minimize the impact on other regions' performance data, these Halifax-Dartmouth operations were included in the region to which they are in closest proximity.

APPENDIX A:

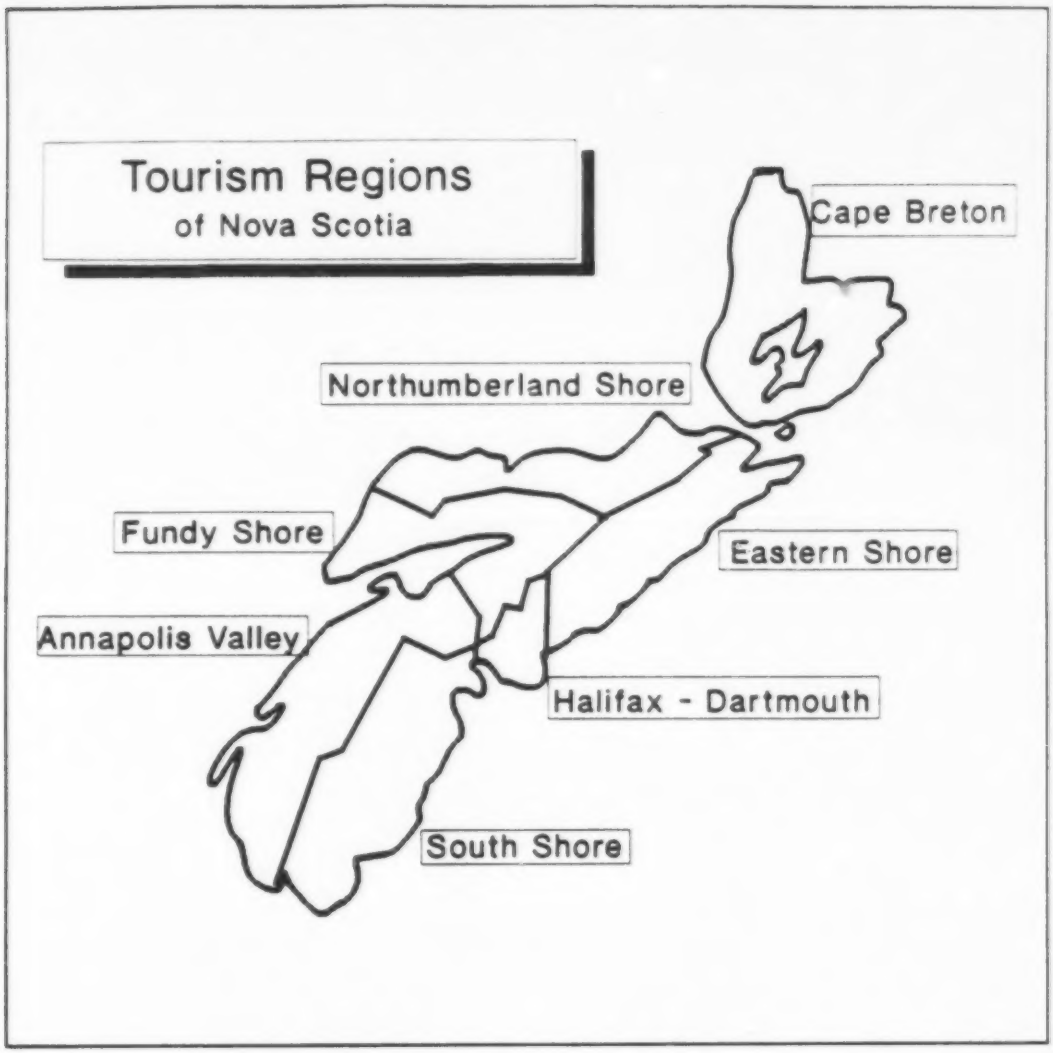
CAMPGROUND DEFINITIONS & TERMS

Definitions & Terms

Occupancy Rate	Percentage of total available site-nights occupied by both seasonal and transient campers.
Person-Night	The equivalent of one person registered for one night. For example, if one person stayed at a campground for two nights, it would be considered two person-nights. Similarly, if two persons stayed for one night, it would also be considered to be two person nights.
RV	Recreational vehicle.
Seasonal Camper	A camper registered at the same campground for a continuous stay of one month or longer.
Serviced Site	Camp site providing one or more of the following services: sewer, power or water hook-up.
Short-Term Camper	A camper registered at the same campground for less than one month, also referred to as a transient camper.
Site-Night	The equivalent of one campsite occupied for one night.
Unserviced Site	Camp site not providing any combination of sewer, power and water hook-up.

APPENDIX B:

TOURISM REGIONS OF NOVA SCOTIA


Tourism Regions
of Nova Scotia
Cape Breton
Northumberland Shore
Fundy Shore
Eastern Shore
Annapolis Valley
Halifax - Dartmouth
South Shore

Description of Tourism Regions of Nova Scotia

Annapolis Valley	Includes portion of Yarmouth County north of line between Yarmouth Ferry Terminal and junction of Yarmouth, Digby, Shelburne and Queens County lines; all of Annapolis and Kings Counties, and portion of Hants County roughly west of the Avon River.
South Shore	Includes portion of Yarmouth County southeast of line between Yarmouth ferry terminal and junction of Yarmouth, Shelburne, Digby and Queens County lines; all of Queens and Lunenburg Counties; and portion of Halifax County roughly described as area west of Pockwock Lake, south of Route 103 and west of route 306.
Halifax-Dartmouth	Includes Cities of Halifax and Dartmouth and (roughly) those areas contained by routes 253, 306, and 349 in the south: area bounded by Route 103 in the west, the Hants County and Colchester County lines in the north and the line between the mouth of Cole Harbour and Gays River in the east.
Eastern Shore	Includes portion of Halifax County east of line between mouth of Cole Harbour running northeast to Gays River, and all of Guysborough County.
Cape Breton	Includes all of Cape Breton Island.
Northumberland Shore	Includes portion of Cumberland and Colchester Counties north of the Trans Canada Highway to Wentworth, then area north of line between Wentworth and Mount Thom, all of Pictou and Antigonish Counties.
Fundy Shore	Includes portion of Cumberland and Colchester Counties south of Trans Canada Highway to Wentworth, remainder of Colchester County southwest of line between Wentworth and Mount Thom and portion of Hants County east of the Avon River.